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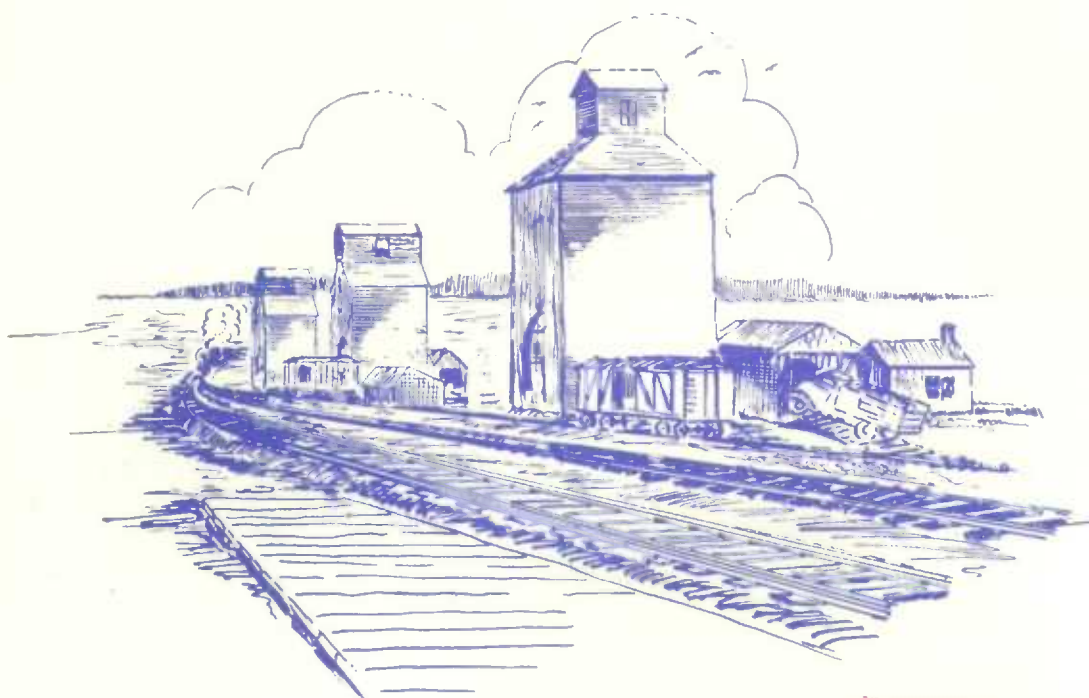
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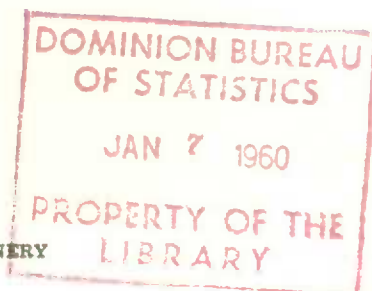
AGRICULTURE DIVISION

THE WHEAT REVIEW



NOVEMBER 1959

THE QUEEN'S PRINTER AND CONTROLLER OF STATIONERY
OTTAWA, 1959



FARMERS MARKETINGS OF WHEAT, PRAIRIE PROVINCES

(SPECIFIED PERIODS)

MILLION BUSHEL

450 —

400 —

350 —

300 —

250 —

200 —

150 —

100 —

50 —

0

MILLION BUSHEL

450 —

400 —

350 —

300 —

250 —

200 —

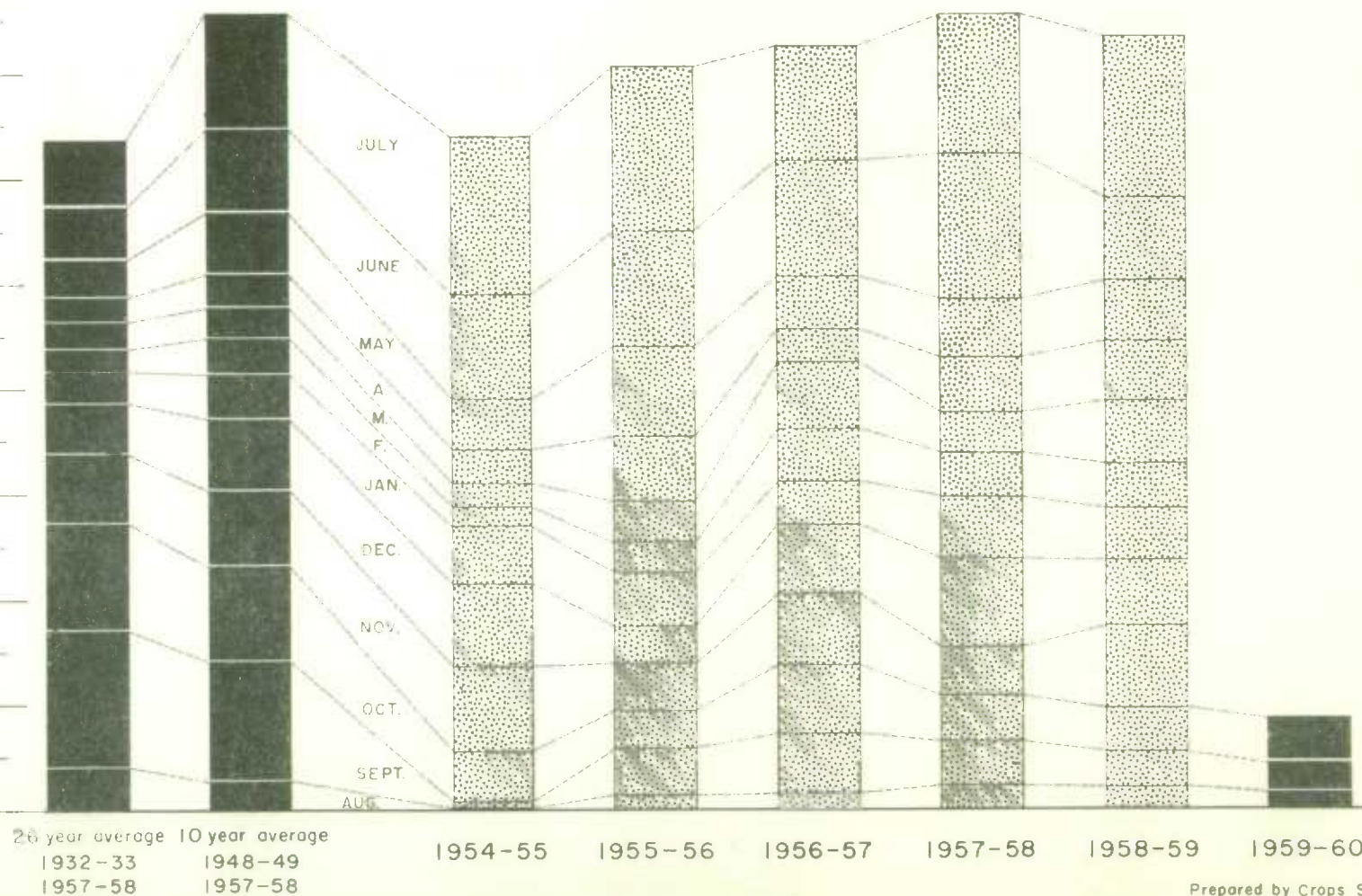
150 —

100 —

50 —

0

PEAK MARKETINGS
1952-53 CROP YEAR
536.0 MILLION BUSHEL



Prepared by Crops Section
and Drafting Unit D.B.S.

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE
WHEAT REVIEW

NOVEMBER 1959

Published by
Authority of the Honourable Gordon Churchill
Minister of Trade and Commerce

Prepared in the Crops Section, Agriculture Division
Dominion Bureau of Statistics, Ottawa.

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about November 1, 1959 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 2,493.9 million bushels, exceeding by 2 per cent the 2,433.6 million available a year ago. Supplies at November 1, 1959, in millions of bushels, were held as follows, with last year's comparable figures in brackets: United States, 1,630.8 (1,579.2); Canada, 723.6 (767.3); Argentina, 61.1 (65.8); and Australia, 78.4 (21.3). Estimates for both years include on-farm stocks as well as those in commercial positions.

Exports Total exports of wheat and wheat flour in terms of wheat from the four major exporting countries during the August-October period of the current Canadian crop year, at 210.5 million bushels, were some 4 per cent below the 219.6 million exported during the same months of 1958. Exports from Canada and Australia were at higher levels than last year while those from United States and Argentina were lower. On a percentage basis, shipments from the four countries during August-October 1959 were shared as follows, with corresponding percentages for the same months of 1958 in brackets: United States, 45 (49); Canada, 36 (34); Argentina, 7 (10); and Australia, 12 (7). Shipments from each of the four countries during August-October of the current (Canadian) and nine preceding crop years are shown in the table below.

Exports of Wheat and Flour in Terms of Wheat, August-October 1959 with Comparisons

August-October	United States	Canada	Argentina	Australia	Total
- million bushels -					
1950	51.4	49.3	17.2	30.9	148.8
1951	116.0	75.4	17.9	30.5	239.8
1952	85.1	94.6	-	23.0	202.7
1953	54.8	79.2	32.5	16.6	183.1
1954	53.8	73.8	33.7	21.5	182.8
1955	54.4	60.1 ^{1/}	30.2	23.2	167.9 ^{1/}
1956	118.8	81.4 ^{1/}	24.2	40.9	265.3 ^{1/}
1957	100.7	73.5 ^{1/}	21.8	24.9	220.9 ^{1/}
1958 ^{1/}	108.2	73.8	21.4	16.2	219.6
1959 ^{2/}	94.4	76.4	14.7	25.0	210.5

^{1/} Revised. ^{2/} Preliminary.

The Outlook for World Wheat Exports The following article was prepared by Dr. S.C. Hudson, Chief, Grain Division, and F.A. Piscopo, Economics Branch, Department of Trade and Commerce, Ottawa. The article originally appeared in the November 7, 1959 issue of "Foreign Trade" published by the Department of Trade and Commerce, Ottawa.

Underlying Trends in World Wheat Markets Wheat production has been growing steadily since the beginning of the century, with the exception of marked declines during the two World Wars; in fact, it has more than doubled during this period. In the early decades, much of the increase resulted from the opening-up of new land in the Western Hemisphere and in Australia. Recent years have brought extensive changes in the pattern of world wheat production. In those

countries in which supply failed to keep pace with rising demand, a higher level of production became a national goal, with little regard paid to domestic costs in relation to international wheat prices. Current production has risen some 30 per cent above the years before the Second World War, and it is double that before World War I. The U.S. Department of Agriculture figures show that world output has averaged 220 million metric tons (8.1 billion bushels) a year for the last four years, 1956-1959. The average for 1950-1954 was 188 million tons (6.9 billion bushels), and for 1945-1949 only 158 million tons (5.8 billion bushels). The production forecast for the next few years is as high as 250 million metric tons (about 9 billion bushels).

A remarkable expansion of the international trade in wheat has occurred since the end of World War II, paralleling production gains. The rapid growth of wheat supplies in the United States available for export and for carryover has become the dominant feature. With the help of various forms of concessional sales and give-away programs, the U.S. has extended its share of the world market to about 40 per cent of the total, from an average of 22-23 per cent for the period from 1900 to 1959.

Western Europe Because Western Europe accounts for well over half of the world's commercial wheat market and 65 per cent of the Canadian export market, developments in this area are particularly significant.

Although world wheat production and also consumption and trade have increased in recent years, a different pattern has emerged in Western Europe. There production of wheat has gone up and commercial imports have gone down, either in absolute terms or proportionately. In other words, the move has been towards a greater measure of self-sufficiency, largely because of national agricultural policies on grains and also because of technological progress.

Wheat is subject to some form of government intervention in all European countries. This intervention is related to price and income support measures and includes such devices as import quotas, import levies, milling quotas, currency control, tariffs, and multiple exchange-rate techniques. Few countries base their price-support level on world market conditions. Instead, they base it on cost of production or other domestic considerations, thus providing incentives for greater output. As a result, some former importing nations are now entering the export market. Traditional deficit countries such as Italy and Spain have so expanded production of soft wheats that they have surpluses for export and have joined the new International Wheat Agreement as exporters.

The international movement of grains is currently affected by a network of trade agreements and payments arrangements. The most recent development along this line is the European Common Market, as a result of which long-term contracts between signatory countries covering the supplying of wheat have already emerged. Such arrangements contribute to rigidity in the pattern of trade and stimulate uneconomic local production. They thus become of particular concern to traditional wheat exporters.

Most of the importing countries control the flow of imports of all grains, either through state-trading agencies or by the use of import licences. Import licences are usually tied in with exchange controls and import quotas. The method of restricting the volume of imports is relatively simple. In breadgrains it is often done by setting milling quotas that make it compulsory for millers in importing countries to use a specified minimum volume of domestic grains in making flour, even if this results in a lower quality. For some countries, such as the United Kingdom and the Netherlands, 25 to 35 per cent of the grist must be made up of

home-grown grains; in others it runs as high as 90 per cent. The current minimum for Germany is 66 per cent and for Austria, Belgium and Ireland, 70 to 79 per cent.

The national grain policies of importers in most cases do not allow consumers in the importing countries to benefit from lower foreign prices and in this manner may contribute to limited consumption. At the same time, the producers in importing countries are protected from the competitive impact of lower-priced grains from abroad. The United Kingdom is a major exception only as far as consumer prices are concerned. By use of the deficiency payment system, the British producer is subsidized but consumer prices are kept more in line with the lower world price level. As long as the majority of importers maintain a comprehensive system of protection to encourage production, the cost of any adjustment in the demand/supply position falls primarily on the exporting countries.

The pattern of development in the European market during the past decade presents certain contrasts when looked at regionally. In the United Kingdom, production increased by about 15 per cent but imports were well maintained. In the northwest European countries, domestic production of wheat increased by about 35 per cent and aggregate net imports declined by over 10 per cent. In southern European countries, total production went up by nearly 60 per cent and net imports down by nearly 90 per cent. During this period, per capita consumption of wheat decreased in Britain and northwest Europe, but increased substantially in southwest Europe.

The outlook is for the maintenance of a continuing increase in wheat production in continental Europe. It seems probable also that Western Europe's grain production will become more genuinely competitive as a result of improvements in productivity. The consequent heavy supplies of soft wheats will undoubtedly cause some shrinking of European export outlets, in which, however, Canadian hard spring wheat should maintain some competitive advantage.

The Soviet Union The largest expansion in wheat production in recent years has taken place in the U.S.S.R. — mainly as a result of the development of the hitherto virgin lands of Kazakhstan, West Siberia and the Urals, a series of good harvests, and improved technology. Russia has traditionally ranked among the world's largest producers and exporters of wheat as well as of other grains. On the basis of present boundaries, wheat production reached a high of over 40 million metric tons in 1937 but did not regain that level until 1955. Since 1954, as a result of the opening-up of new lands, it is estimated that the area sown to wheat in the U.S.S.R. increased from 49 to 69 million hectares and production rose by about 50 per cent. The 1958 production is believed to have been of the order of 2.3 billion bushels, 300 million over the estimated previous high in 1956. This year's output is reported as considerably lower, probably less than two billion bushels, as a consequence of smaller acreage and of drought in a number of areas.

Although official Soviet plans call for a further large increase in grain production by 1965, there is evidence that coarse grains will receive the major attention. With the shortage of fertilizer, the expansion in wheat production to date has resulted in large part from the opening up of new land. It is planned to increase fertilizer deliveries to agriculture, thus making possible greater application to grain crops, going up from the present 1.5 million to 8 to 10 million tons by 1965. Increased yields can therefore be anticipated, although at the same time the present area devoted to wheat will probably be reduced as a result of greater use of crop rotations. Like Canada's prairie wheat land, the yield on much of the newly developed wheat area in Russia will be subject to wide variations, depending on the rainfall.

It is evident, however, that wheat production in the U.S.S.R. will be maintained at a high level and that Russian wheat will be an important potential competitive factor in the world market.

The Major Exporters Aggregate production of wheat in the four major exporting countries — the United States, Canada, Argentina and Australia — during the last five years has averaged 51.4 million metric tons, compared with 39.8 million tons for the period 1935-1939 and 52.7 million tons for the 1946-1950 period. This expansion has stemmed largely from phenomenal increases in yield in the United States and to a lesser extent in Canada, reflecting favourable climatic factors, improved technology, and more capital invested in agriculture. In the United States, the rise in yields more than offset the substantial reduction in acreage in 1956 and 1957, thus cancelling out the expected effect of acreage reductions required by public legislation. In addition to the effect of increased fertilizer and improved cultural operations, the pronounced tendency to remove the poorer soils from production became an important factor in higher yields.

Production in individual exporting countries has varied widely from year to year, particularly in Canada and Australia. During the period 1952-1957, for example, wheat production in Canada ranged from 35 per cent above the five-year average to 39 per cent below. Similarly, in Australia wheat production in individual years ranged from 20 per cent above to 41 per cent below the average for the period.

The distribution of wheat exports among the principal exporting countries is significant in an examination of recent world trends. Although total imports are currently almost double prewar, the most significant element is the growth of concessional exports from the United States under government programs. A large part of this movement has been to under-developed countries in Asia and Latin America which, although they lack immediate purchasing power to satisfy their potential capacity to consume, offer long-term possibilities as commercial outlets.

Clearly there is a great capacity for larger wheat production in the four major exporting countries. However, it is to be expected that as long as the current situation continues under which stocks in the "big four" wheat-exporting countries are sufficient to meet their domestic and export needs for one year, expansion of acreage will be limited and increased production will tend to be largely fortuitous.

The outlook for wheat production is summarized in the following general statement included in the report of the Fourth Session of the FAO Group on Grains:

"Grain production, trade and consumption trends and the appraisal of factors underlying them would indicate that surpluses, or the persistence of production in excess of effective demand, may now be considered as a chronic feature of the present world grain economy. The heart of the problem lies in the level of price or income guarantees to producers of wheat and other grains in many exporting as well as importing countries. These guarantees, combined with other aspects of national agricultural policies, if maintained substantially unchanged, will continue, together with technological advance, to stimulate year after year an output larger than can be absorbed by normal effective demand. Independent measures of surplus disposal may therefore assume a semi-permanent character and affect an increasing part of the international trade in grains, thus adding to the marketing difficulties now being experienced by exporting countries."

Current Situation in World Wheat Markets The world supply of wheat for the year 1959-60 is believed to be much the same as in the year just past -- and once again well above the commercial demand.

Supplies on hand at July 1 in the four major exporting countries totalled somewhat more than two billion bushels, up 22 per cent from last year. Most of the increase occurred in the United States; Canada is the only major exporter that managed to reduce stocks. It is probable, however, that the larger carryover (which exceeded all previous records) will be offset by smaller production in 1959.

It is estimated that world wheat production in 1959 will approximate 8 billion bushels, compared with nearly 9 billion last year. This sizable decline results mainly from lower yields in some key countries because of less favourable climatic conditions. Instances of a reduction in seeded acreage are few: the U.S.S.R., Italy, France, and Argentina are the most significant cases.

Prospects for wheat production in most of Europe and Asia are favourable; on the other hand, it is now certain that the outturn in North America will be smaller than in 1958. At this time of the year it is too early to prognosticate on crops in the Southern Hemisphere. However, on the basis of seeded acreage and of weather conditions so far, production will be moderately less than last year.

Official figures by the U.S. Department of Agriculture give a U.S. crop of about 1,116 million bushels, compared with last year's unparalleled 1,462 million bushels. Notwithstanding this sharp drop, the new crop will provide half-a-billion bushels for export and carryover, to be added to the gigantic surplus stored in the United States. The larger crop expected in Canada -- forecast by DBS at 421 million bushels,* up 13 per cent from 1958 -- and the improvement in Mexico's production can only in part compensate for the reduced U.S. outturn. The total North American production will be thus smaller than in the previous year.

In Western Europe Wheat production in Western Europe is expected to be practically the same as in 1958, but the quality of the crop will be substantially better. Production in the United Kingdom is expected to total about 100-150 thousand tons less than last year's 2,750,000 tons. Wheat of remarkably fine appearance and quality has been harvested, whereas much of last year's crop was not fit for human consumption. Wheat production in Western Germany is estimated as somewhat higher than last year's 3.7 million tons, despite the drought that curtailed the yields, especially of spring wheat. France has gathered an excellent crop in quality as well as quantity; it may exceed 11 million tons, compared with 9.5 million harvested in 1958. This will leave France with almost three million tons for export and carryover, above the stocks already available. In the Netherlands, Belgium and Austria, high yields of good-quality wheat are reported as common. In Southern Europe as a whole production has been satisfactory, with bumper crops harvested in Spain, Yugoslavia and Greece and crops moderately reduced but still sufficient for domestic needs gathered in Portugal and in Italy. In the Scandinavian countries, particularly in Sweden, the drought has damaged yields more than elsewhere in Western Europe; a material reduction in wheat outturn is probable.

In Eastern Europe Reports from Eastern Europe are fragmentary, but on the basis of available information it seems that the supply position will be less stringent than in previous years. Wheat crops in the satellite countries are reported as adequate, with the exception of Poland, where the prolonged drought

* Recent weather conditions in the Prairie Provinces may result in a lowering of this figure.

International Wheat Agreement
Cumulative Totals of Purchases by Importing Countries from Exporting Countries
Crop Year 1959-60

Importing Countries	EXPORTING COUNTRIES							Total Purchases
	Canada	Australia	France	Italy	Spain	Sweden	U.S.A.	
	1/	2/	2/	2/	2/	2/	2/	
- thousand bushels -								
Austria	1,277	-	-	58	-	-	-	1,335
Belgium and Luxembourg	3,316	-	48	1	-	-	611	3,976
Brazil	-	-	1,576	-	-	-	800	2,376
Cuba	15	-	-	-	-	-	2,994	3,009
Denmark	19	-	396	-	-	-	295	710
Dominican Republic	159	-	1	-	-	-	193	353
El Salvador	181	-	-	-	-	-	-	181
Germany	11,262	2,833	3,545	9	92	14	2,983	20,738
Greece	1	-	-	-	-	-	-	1
Haiti	3	-	-	-	-	-	201	204
Honduras Republic	13	-	-	-	-	-	-	13
Iceland	3	-	-	-	-	-	-	3
India	4,116	2,351	-	-	-	-	1	6,468
Indonesia	316	257	-	33	-	-	-	606
Ireland	737	425	-	-	-	-	-	1,162
Israel	-	-	-	-	-	-	4	4
Japan	15,625	5,380	-	-	-	-	3,773	24,778
Korea	-	-	-	-	-	-	-	-
Netherlands	3,695	11	1,049	-	296	-	2,600	7,651
New Zealand	-	2,423	-	-	-	-	-	2,423
Norway	1,366	-	308	-	-	-	280	1,954
Peru	1,902	-	-	-	-	-	822	2,724
Philippines	2,088	300	-	-	-	-	1,446	3,834
Portugal	114	157	303	2	-	-	70	646
Rhodesia and Nyasaland	10	1,355	-	-	-	-	1	1,366
Saudi Arabia	2	37	-	-	-	-	504	543
Switzerland	3,275	-	461	120	-	-	112	3,968
Union of South Africa	6,369	-	-	-	-	-	-	6,369
United Arab Republic	1	-	-	790	-	-	475	1,266
United Kingdom	43,432	4,606	290	-	-	-	5,274	53,602
Vatican City	221	-	-	-	-	-	-	221
Venezuela	1,232	-	-	-	-	-	2,435	3,667
Totals	100,750	20,135	7,977	1,013	388	14	25,874	156,151
Percentage of Total Sales by Exporting Countries ...	64.52	12.89	5.11	.65	.25	.01	16.57	100.00

NOTE: Argentina - no sales reported
Mexico - no sales reported

1/ Canadian Sales through October 31, 1959.

2/ Sales recorded by International Wheat Council through October 10, 1959.

CANADIAN SITUATION

Supply Position Total estimated supplies of wheat for the 1959-60 crop year are placed at 960.0 million bushels, consisting of the August 1 carry-over of 546.5 million and the 1959 crop, based on conditions at October 31, at 413.5 million bushels. Supplies of the size indicated represent a decline of 5 per cent from the 1958-59 total of 1,011.2 million bushels. After deducting an estimated 160.0 million bushels for anticipated domestic requirements, supplies available for export and for carryover during 1959-60 would amount to 800.0 million bushels, 5 per cent below the 841.0 million in 1958-59.

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the August-October period of the current crop year amounted to 76.4 million bushels, exceeding by 4 per cent the total of 73.8 million exported during the same months of the preceding crop year. The balance remaining on November 1, 1959 for export and for carryover, amounted to 723.6 million bushels, 6 per cent less than the November 1, 1958 total of 767.3 million.

Canadian Wheat Supplies

Item	1958-59 <u>1/</u>	1959-60 <u>2/</u>
	- million bushels -	
Carryover in North America at beginning of crop year (August 1)	639.5	546.5 <u>3/</u>
New Crop	371.7	413.5 <u>3/</u>
Imports of wheat for domestic use, August	<u>4/</u>	<u>4/</u>
Total estimated supplies	1,011.2	960.0
Less estimated domestic requirements for crop year .	170.2 <u>3/</u>	160.0
Available for export and for carryover	841.0	800.0
Deduct:		
Exports of wheat in bulk, August-October <u>5/</u>	64.8	66.2
Exports of bagged seed wheat, August-October <u>6/</u> ..	0.6	0.4
Total exports of wheat as grain	65.4	66.6
Exports of wheat flour in terms of wheat, August - October <u>6/</u>	8.3	9.8
Total exports of wheat and wheat flour	73.8	76.4
Balance on November 1 for export and for carryover .	767.3	723.6

1/ Subject to revision. 2/ Preliminary. 3/ Revised. 4/ Less than 50,000 bushels. 5/ As reported by the Board of Grain Commissioners. Includes overseas clearances and imports into the United States. 6/ Customs returns, 1958-59 adjusted for time lag.

Farmers' marketings of wheat (both east and west) up to November 18 of the current crop year amounted to 65.9 million bushels compared with 77.0 million marketed during the corresponding period of the preceding crop year. Some 31.3

million bushels of this year's total deliveries (both east and west) were marketed during the five weeks October 15 to November 18. Disappearance of Canadian wheat through licensed elevator channels into export and domestic channels (overseas clearances, plus imports into the United States, plus Canadian domestic use and including grain milled for subsequent export) during the same five weeks amounted to some 39.8 million bushels. With export and domestic requirements exceeding deliveries during the period under review, the total visible supply of Canadian wheat at November 18, 1959 amounted to 369.2 million bushels compared with 380.6 million at October 14.

The total visible supply of Canadian wheat at November 18 this year was 2 per cent less than the 1958 comparable total of 375.0 million bushels and only slightly below the 1957 total of 370.3 million. Supplies in country elevators amounted to 216.4 million bushels compared with 218.7 million a year ago and 208.8 million two years ago. Interior terminal stocks accounted for 12.1 million bushels, below the 1958 total of 13.0 million but above the 1957 total of 11.8 million bushels. Some 9.5 million bushels were "In transit rail" (Western Division) at November 18, 1959, below both the 1958 and 1957 comparable totals of 11.0 million and 12.5 million bushels, respectively. Supplies at the Lakehead amounted to 41.8 million bushels compared with 39.6 million in this position a year ago and 41.8 million (including 184,000 bushels in Storage Afloat) two years ago. Some 5.6 million bushels were "In transit lake" at November 18 this year, sharply below both the 1958 and 1957 totals of 9.4 million and 10.2 million, respectively. Stocks of 36.5 million bushels in Bay, Lake and Upper St. Lawrence ports were above the 35.2 million of a year ago but below the 39.7 million of two years ago. Supplies in Lower St. Lawrence and Maritime ports amounted to 24.3 million bushels compared with 24.3 in 1958 and 24.1 million in 1957. Supplies in West-Coast ports (Vancouver-New Westminster and Victoria), at 9,171 thousand bushels, were above last year's comparable total of 8,430 thousand but relatively little changed from the 1957 total of 9,216 thousand bushels.

October 1959 Exports of
Wheat and Flour Total
25.6 Million Bushels

Combined exports of wheat in bulk, bagged seed wheat and wheat flour in terms of grain equivalent during October 1959 amounted to 25.6 million bushels, 8 per cent greater than the ten-year (1948-1957) average for the month of October of 23.7 million, but 3 per cent less than the September 1959 total of 26.3 million and 13 per cent below the October 1958 total of 29.4 million bushels. Exports of wheat in bulk (as reported by the Board of Grain Commissioners) during October 1959, at 22.4 million bushels, were 1 per cent less than the 22.6 million exported during the preceding month and 12 per cent below the October 1958 total of 25.5 million. Exports of bagged seed wheat during October 1959, based on Canadian Customs returns, amounted to 89 thousand bushels compared with the September figure of 155 thousand and the October 1958 total (adjusted to remove time lag) of 188 thousand bushels. Customs returns also indicate that the equivalent of 3.1 million bushels of wheat was exported in the form of flour during October 1959, representing a decrease of 14 per cent from the September total of 3.5 million and 16 per cent less than the adjusted October 1958 total of 3.7 million.

Cumulative exports of wheat in bulk during the August-October period of the 1959-60 crop year amounted to 66.2 million bushels, representing an increase of 2 per cent over the comparable 1958 total of 64.8 million. The United Kingdom, remaining in its position as Canada's leading market for wheat, received shipments amounting to 24.7 million bushels and representing 37 per cent of the three month total. During the August-October period of the 1958-59 crop year shipments of wheat to the United Kingdom amounted to 26.2 million bushels and accounted for 40 per cent of the total. Other major markets for Canadian wheat in

bulk during the first three months of the current crop year, with figures for the same period of the preceding crop year in brackets, were as follows, in millions of bushels: Japan, 10.3 (10.4); Federal Republic of Germany, 6.1 (9.3); India, 3.7 (2.8); Netherlands, 3.5 (5.0); Belgium, 3.1 (3.4); Iraq, 2.0 (nil); Switzerland, 1.6 (2.2); Union of South Africa, 1.6 (nil); Peru, 1.3 (0.2); and Norway, 1.1 (1.1).

Cumulative exports of wheat flour during the first three months of the 1959-60 crop year, based on Customs returns, were the equivalent of 9.8 million bushels and exceeded by 18 per cent the adjusted August-October 1958 total of 8.3 million bushels. As with wheat in bulk, the United Kingdom was also the principal market for Canadian wheat flour. Shipments of wheat flour to that country during the period under review amounted to the equivalent of 3.5 million bushels and accounted for 35 per cent of the August-October 1959 total. During the same months of the 1958-59 crop year shipments of wheat flour to the United Kingdom amounted to the equivalent of 3.3 million bushels and represented 40 per cent of the total. Other leading markets for Canadian wheat flour in terms of grain equivalent during the August-October period of the 1959-60 crop year, with revised data for the same months of the preceding crop year in brackets, were as follows, in thousands of bushels: Philippine Islands, 1,057 (1,266); Ceylon, 772 (23); Ghana, 618 (162); Trinidad and Tobago, 521 (384); United States, 354 (399); Jamaica, 344 (377); Leeward and Windward Islands, 241 (195); and Japan, 232 (14).

Canada's 1959 Wheat
Crop Estimated at
413.5 Million Bushels

Based on conditions at October 31 Canada's 1959 wheat crop is now estimated at 413.5 million bushels, 11 per cent above last year's estimate of 371.7 million but 16 per cent below the ten-year average of 490.4 million bushels.

The average yield at 17.9 bushels per acre is some one per cent above a year ago but 10 per cent below the ten-year (1949-1958) average of 20.0 bushels per acre. This year's all Canada crop of spring wheat, including durum, is estimated at 401.1 million bushels compared with the 1958 crop of 347.8 million, and the ten-year average of 468.5 million bushels. Ontario's winter wheat crop estimated at 12.5 million bushels, shows a decrease of 48 per cent from last year's crop due mainly to severe winterkilling.

In the Prairie Provinces, the 1959 wheat crop is now placed at 399.0 million bushels, some 53.0 million or 15 per cent above the 1958 crop. The current crop is above that of 1958 in Manitoba where production is forecast at 60.0 million bushels compared with 58.0 million last year. Production in Saskatchewan, which accounts for about 56 per cent of this year's all Canada indicated wheat crop is estimated at 232.0 million bushels, some 21 per cent more than last year's outturn of 192.0 million bushels. The Alberta crop, forecast at 107.0 million bushels is up 11 per cent from last year's production of 96.0 million bushels. The indicated average yield per seeded acre in the Prairie Provinces as a whole is 17.7 bushels per acre compared with 17.1 bushels last year, the ten-year (1949-1958) average of 19.6 bushels and the long-term (1908-1957) yield of 16.6 bushels per acre. The average yield in Manitoba this year is 23.1 bushels while Saskatchewan averaged 15.7 bushels and Alberta 20.7 bushels per acre. Current estimates of production in the Prairies include relatively small quantities of winter wheat, principally in Alberta, and an estimated 14.7 million bushels of durum wheat.

Due to poor harvest weather, 8 million bushels of wheat representing 13 per cent of the acreage in Manitoba remained to be threshed around November 1 while in Saskatchewan 68 million bushels or 29 per cent remained in the fields. In Alberta 36 million bushels accounting for 34 per cent of the wheat crop in that province, remained to be threshed.

The acreage in durum wheat in the Prairie Provinces in 1959 was 1,018,400 acres compared with 1,125,000 acres seeded in 1958. Average yields, estimated at 14.4 bushels per acre were above the 1958 outturn of 14.1 bushels but did not offset the acreage decline. As a result present indications are for a crop of 14.7 million bushels compared with the 1958 crop of 15.9 million bushels. Estimated production by provinces, in millions of bushels, is as follows: Manitoba, 1.5; Saskatchewan, 12.4; and Alberta, 0.8.

November Estimate of the 1959 Production of Spring and Winter Wheat in Canada
Compared with 1958

Crop	Area		Yield per Acre		Production	
	1958	1959	1958	1959 1/	1958	1959 1/
<u>CANADA</u>	- acres -		- bushels -		- bushels -	
Spring wheat 2/	20,319,100	22,639,900	17.1	17.7	347,834,000	401,056,000
Winter wheat ..	580,000	425,000	41.2	29.3	23,896,000	12,464,000
All wheat .	20,899,100	23,064,900	17.8	17.9	371,730,000	413,520,000
<u>PRAIRIE PROVINCES</u>						
Manitoba	2,358,000	2,594,000	24.6	23.1	58,000,000	60,000,000
Saskatchewan ..	13,182,000	14,803,000	14.6	15.7	192,000,000	232,000,000
Alberta	4,704,000	5,160,000	20.4	20.7	96,000,000	107,000,000
Totals 2/ .	20,244,000	22,557,000	17.1	17.7	346,000,000	399,000,000

1/ As indicated on basis of conditions on or about October 31.

2/ Includes durum wheat and relatively small quantities of winter wheat in all provinces except Ontario.

November Estimate of the 1959 Production of Durum Wheat 1/
in the Prairie Provinces Compared with 1958

Province	Area		Yield per Acre		Production	
	1958	1959	1958	1959 2/	1958	1959 2/
	- acres -		- bushels -		- bushels -	
Manitoba	94,000	78,400	19.1	19.1	1,800,000	1,500,000
Saskatchewan	959,000	901,000	13.0	13.8	12,500,000	12,400,000
Alberta	72,000	39,000	22.2	20.5	1,600,000	800,000
Totals	1,125,000	1,018,400	14.1	14.4	15,900,000	14,700,000

1/ Acreage and production included with spring wheat.

2/ As indicated on the basis of conditions on or about October 31.

Delivery Policy **Supplementary Quotas - Soft White Spring Wheat** The Canadian Wheat Board, in its Instructions to the Trade, re Quotas (General) No. 6 under date of November 13, 1959, announced in part that in order to obtain sufficient quantities of Soft White Spring Wheat to meet mill requirements, a supplementary delivery quota of five (5) bushels per seeded acre of Soft White Spring Wheat is hereby authorized to become effective Monday, November 16, 1959, to producers who contracted with mills for the production of this variety.

As delivery permit declarations do not indicate the acreage seeded to this variety of wheat, special permits will be issued to such producers on the basis of information supplied by the mills concerned and deliveries on this supplementary quota may only be made on the basis of such permit which is to be attached to the producer's delivery permit book.

Exchanges of Board Wheat, Oats and Barley for Seeding Purposes 1959-60 Crop Year The Canadian Wheat Board in its Instructions to the Trade, No. 27 under date of November 18, announced in part that to enable producers to secure their seed requirements, the Board will allow companies, effective immediately, to exchange Board stocks of wheat, oats and barley for lower grades of such grains on the following basis:

- (a) Any grade of wheat, including Durum, for a lower grade of wheat.
- (b) Any grade of oats for a lower grade of oats.
- (c) Any grade of barley for a lower grade of barley.

The above exchanges may be made provided that the quantity of any grain exchanged does not exceed a maximum of two (2) bushels per acre seeded to that grain, as shown in the producer's 1959-60 delivery permit book.

The exchange will be on a bushel-for-bushel basis and cash settlement must be made for the difference in grade, basis the Board's domestic sale prices, which prices are broadcast daily (not the initial payment prices) on the date of exchange plus the usual elevator charges for such service.

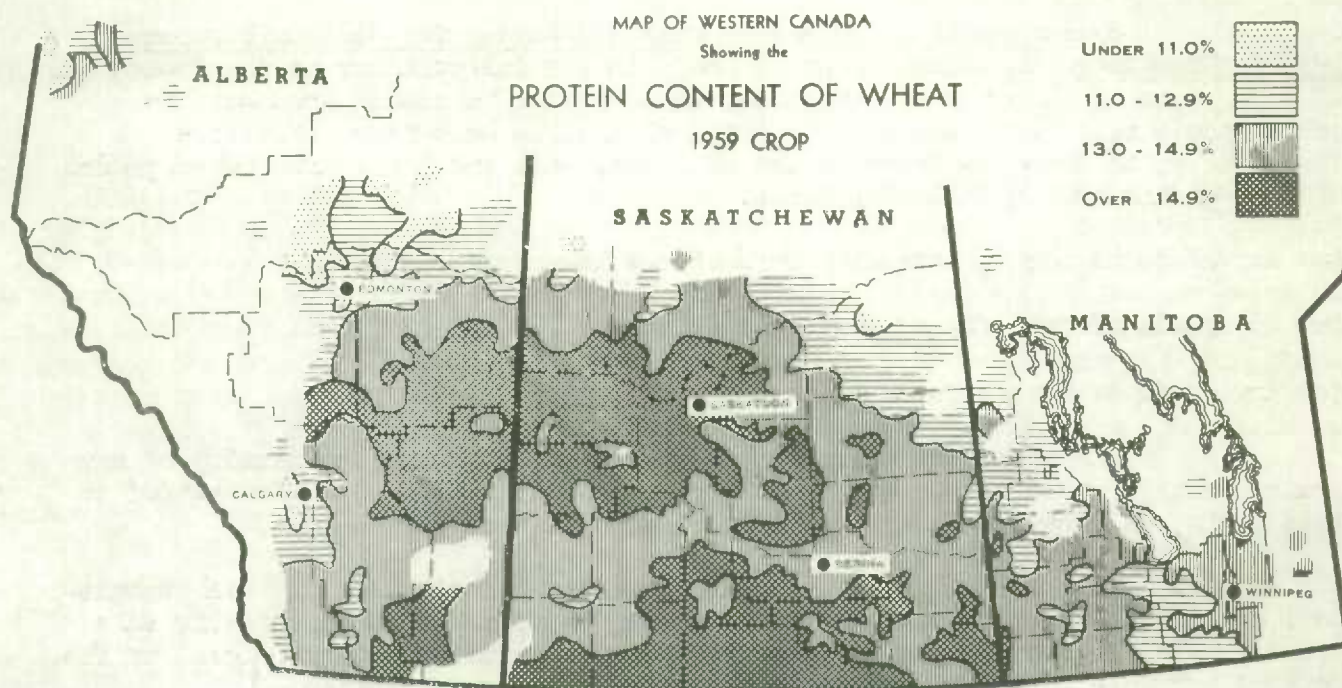
General Quota Position By November 30, 1959 out of a total of 2,015 shipping points in the Western Division, the Canadian Wheat Board had placed 2 points on a quota of 5 bushels per specified acre and 269 on a 3-bushel quota. Most points, however, were on one and two bushel quotas, with 851 points on a 2-bushel quota and 814 points on a 1-bushel quota. Only 79 points remained on the Initial Unit Quota.

Summary of Elevator Shipping Points in the Western Division
as at November 30, 1959

Province	Initial Unit Quota	General Quota in Bushels per Specified Acre				Total
		One	Two	Three	Five	
Ontario	-	-	-	2	-	2
Manitoba	28	198	120	27	-	373
Saskatchewan	39	347	520	178	-	1,084
Alberta	12	269	210	60	-	551
British Columbia	-	-	1	2	2	5
All Provinces	79	814	851	269	2	2,015

Protein Survey of
Western Canada's 1959
Hard Red Spring Wheat

According to crop bulletin No. 74 "Protein Survey of Wheat, 1959" published by the Board of Grain Commissioners for Canada, the average protein content of the 1959 crop is 14.2 per cent, as compared with 13.8 per cent for the 1958 crop and 13.5 per cent for the long-term average. The 1959 estimate is based on analyses of 6,437 samples of statutory grades of hard red spring wheat from 1,782 shipping points in the Prairie Provinces.



Map of Western Canada showing the protein content of hard red spring wheat, 1959 crop.

The pattern of the 1959 map shows two very large high-protein areas (over 14.9 per cent) in southern and west central Saskatchewan and in east central Alberta. Crop Districts 3AS, 6B, 7A and 7B in Saskatchewan are almost completely covered by higher-protein areas, as well as nearly half of Crop Districts 1 and 4 in Alberta. Average-protein areas (13.0 - 14.9 per cent) cover most of Manitoba and eastern Saskatchewan and continue in a large circular sweep around the high-protein areas in Saskatchewan and Alberta. Below-average protein areas are mostly in Crop Districts 3 and 11 in Manitoba, in northeastern Saskatchewan and in northern Alberta.

Protein Contents of Grades of Hard Red Spring Wheat
1959 Values for Each Province and 1959 and 1958 Values for Western Canada

Grade	1959 Crop			Western Canada	
	Manitoba	Saskatchewan	Alberta	1959	1958
- per cent -					
No. 1 Northern	13.0	14.6	14.1	14.4	14.4
No. 2 Northern	13.4	14.6	14.0	14.3	13.9
No. 3 Northern	13.2	14.5	13.8	14.1	13.4
No. 4 Northern	13.5	14.6	12.9	13.8	13.7
No. 4 Special	15.8	16.5	16.4	16.4	15.6
No. 2 C.W. Garnet	-	-	-	-	11.9
No. 3 C.W. Garnet	-	-	10.4	10.4	12.3
No. 4 C.W. Garnet	11.7	-	15.0	14.3	-
Weighted Mean	13.3	14.6	13.6	14.2	13.8

Quality of 1959
Western Canadian
Wheat

The following information relative to the quality of this year's wheat crop in the Prairie Provinces is taken from a press release issued on November 12, 1959 by the Grain Research Laboratory, Board of Grain Commissioners for Canada, summarizing Crop Bulletin No. 73 "Canadian Wheat, 1959". Adjustments have been made to bring the release in line with the November estimate of production.

Western Canada's 1959 hard red spring wheat crop is high in protein content and baking strength, but bushel weight is lower than in 1958, according to reports released by the Board of Grain Commissioners' Laboratory.

Average protein content is 14.2%, based on analyses of 6,437 samples of No. 1 to No. 4 Northern, No. 4 Special, and Garnet grades from 1,782 shipping points in the three Prairie Provinces. This protein level is 0.4% higher than in 1958 and 0.7% higher than the long-term average, and has been exceeded only twice before, in 1941 (15.1%) and 1936 (14.9%). Average protein levels for Provinces are: Manitoba, 13.3%; Saskatchewan, 14.6%; and Alberta, 13.6%. High-protein areas (over 14.9%) cover a large section of the western half of Saskatchewan and eastern Alberta. Below-average areas (11.0 to 12.9%) are mostly in Manitoba, northeastern Saskatchewan, and Northern Alberta.

Average bushel weights of wheat cleaned for milling for grades 1, 2, 3 and 4 Northern are 64.0, 62.0, 61.2 and 61.0 lb. respectively, and corresponding protein contents are 14.1, 14.2, 14.0 and 13.8%. All four grades mill well and give good yields of flour. The first three grades are similar in flour qualities, but No. 4 Northern is higher in ash and gassing power, poorer in flour colour, and lower in baking absorption. Nos. 1 and 2 Northern are essentially the same in baking strength, with a significant drop for No. 3 Northern and a further reduction for No. 4 Northern.

Production is put at 384.3^{1/2} million bushels, but a large volume of grain will remain unthreshed until spring because of bad harvesting weather. It is expected that No. 3 Northern will be the largest grade (about 38%), followed by No. 2 Northern (about 26%), and No. 4 Northern (about 21%). No. 1 Northern will be a very small grade this year. Although some No. 4 Special has been harvested, it is not likely that it will be available in commercial quantities because of limited space in country elevators for separate binning. Bushel weight will be more important than usual as a grading factor, and frost injury, bleaching, sprouting, and other forms of damage associated with wet weather will be the main causes for degrading. There will be a considerable volume of tough and damp wheat this year.

Production of durum wheat this year is estimated at 14.7 million bushels, i.e., 1.5 million in Manitoba, 12.4 million in Saskatchewan, and 0.8 million in Alberta. The new durum crop is high in protein content but down in bushel weight. The wheat is vitreous and mills very well, yellow pigment is high, and dough properties are very good. Tests made on Nos. 2 and 3 C.W., Extra No. 4 C.W., and No. 4 C.W. show that the macaroni for the four grades has excellent colour with brightness decreasing as grade goes down. This year there is very little No. 1 C.W., and it is expected that about 50% of the crop will grade No. 3 C.W., about 25% No. 2 C.W., and about 7% each of Extra No. 4 and No. 4 C.W. As increasing quantities of 1959 durum wheat enter export channels, there will be a rise in average protein content and in percentage vitreous kernels; macaroni colour may be expected to improve, and dough properties will be somewhat better. Crop Bulletin No. 73 contains comprehensive milling and baking data for different sets of samples of hard red spring wheat, and the semolina and macaroni qualities of different sets of durum wheat samples.

Farmers' Marketings Deliveries of wheat from farms in the Prairie Provinces up to November 18 of the current crop year amounted to 64.8 million bushels, 11 per cent less than the comparable 1958 total of 72.6 million and sharply below the ten-year (1948-1957) average for the period of 139.8 million bushels.

Farmers' Marketings 1/ of Wheat in the Prairie Provinces 1959-60

Week Ending		Manitoba	Saskatchewan	Alberta	Total	Last Year 2/
- bushels -						
August	5, 1959 .	44,420	225,139	1,361	270,920	212,502
	12	55,738	164,404	16,421	236,563	564,330
	19	233,203	481,581	132,441	847,225	1,801,337
	26	455,278	1,607,041	183,143	2,245,462	3,857,564
September	2	680,686	2,218,601	298,820	3,198,107	3,666,665
	9	481,803	2,203,021	472,181	3,157,005	4,677,488
	16	734,026	2,391,225	577,939	3,703,190	5,633,606
	23	852,348	3,196,941	912,706	4,961,995	3,408,239
	30	433,670	1,978,129	817,320	3,229,119	2,681,695
October	7	564,612	4,852,909	1,089,462	6,506,983	5,257,085
	14	237,534	4,120,291	926,424	5,284,249	4,774,024
	21	157,874	2,180,483	1,012,149	3,350,506	5,425,551
	28	283,387	3,586,669	1,348,941	5,218,997	6,589,019
November	4	1,004,524	3,961,909	1,263,696	6,230,129	8,727,606
	11	393,294	5,579,067	1,441,861	7,414,222	7,581,183
	18	1,425,698	5,814,873	1,749,135	8,989,706	7,764,301
Totals		8,038,095	44,562,283	12,244,000	64,844,378	72,622,195
Average similar period:						
1948-1957		19,068,056	82,893,148	37,861,682	139,822,887	

1/ Includes receipts at country, interior private and mill elevators, interior semi-public terminals and platform loadings.

2/ Revised.

New Varieties of Wheat Two new varieties of hard red spring wheat have been developed by the Canada Department of Agriculture and are ready for release to growers in the prairie provinces, the Hon. Douglas S. Harkness, Minister of Agriculture, announced on November 20.

The varieties, "Pembina" (Pemb-in-a) and "Canthatch" (Can-Thatch), were developed by the Rust Area Project Group centered at the Department's Winnipeg research station.

Pembina has excellent milling and baking qualities. It is more resistant to rust and is slightly earlier than Selkirk, the dominant variety in the rust area at present. It is not quite as resistant to lodging as Selkirk. Pembina will be distributed to growers in Manitoba and that part of Saskatchewan east of the third Meridian.

Canthatch also has good milling and baking qualities. It is similar to Thatcher in all characteristics except that it is more resistant to stem rust.

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Visible Supply of Canadian Wheat, November 18, 1959
Compared with Approximately the Same Date, 1957 and 1958

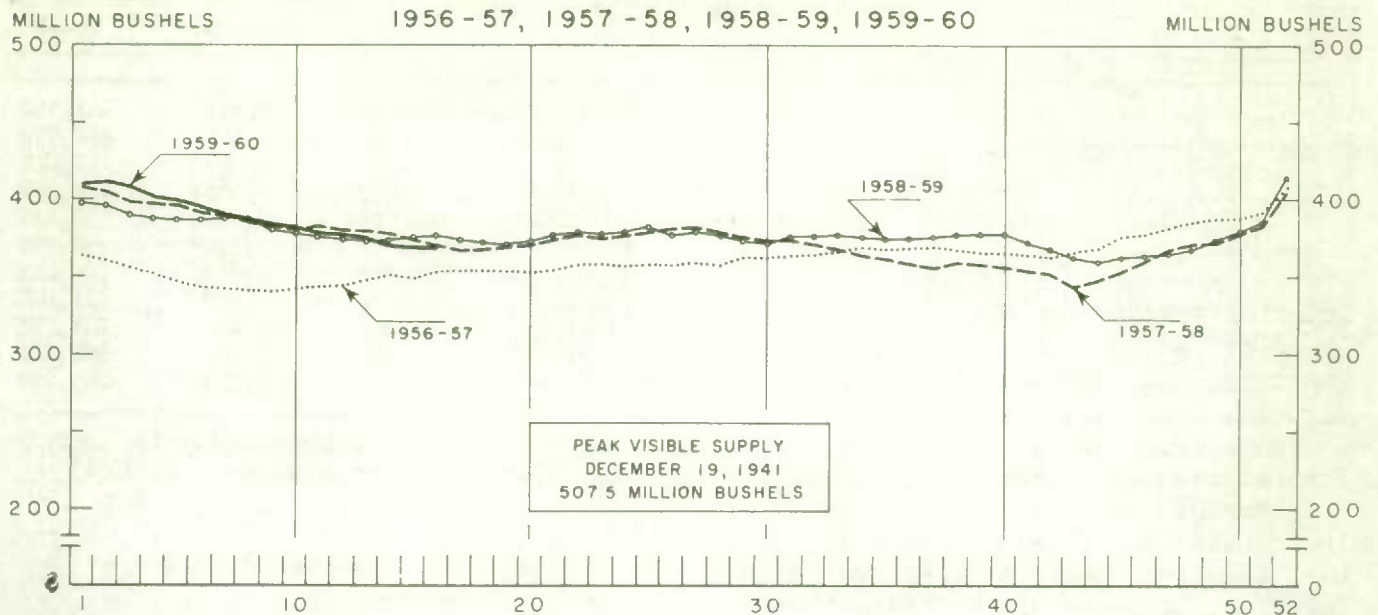
Position	1957	1958	1959
- thousand bushels -			
Country elevators - Manitoba	25,966	25,200	22,815
Saskatchewan	117,326	121,719	119,130
Alberta	65,503	71,789	74,448
Totals	208,796	218,708	216,393
Interior private and mill	5,609	7,336	6,844
Interior terminals	11,770	13,035	12,097
Vancouver-New Westminster	9,046	8,135	8,936
Victoria	170	295	235
Churchill	4,605	4,870	4,871
Fort William-Port Arthur	41,619	39,613	41,764
Storage Afloat	184	-	-
In transit rail (Western Division)	12,518	11,014	9,520
Bay, Lake and Upper St. Lawrence Ports ...	39,691	35,213	36,524
Lower St. Lawrence and Maritime Ports	24,140	24,279	24,256
In transit lake	10,228	9,412	5,632
In transit rail (Eastern Division)	1,716	3,069	1,928
United States ports	237	-	159
Totals	370,330	374,979	369,161

Grading of Wheat Inspected, August-October 1959 with Comparisons

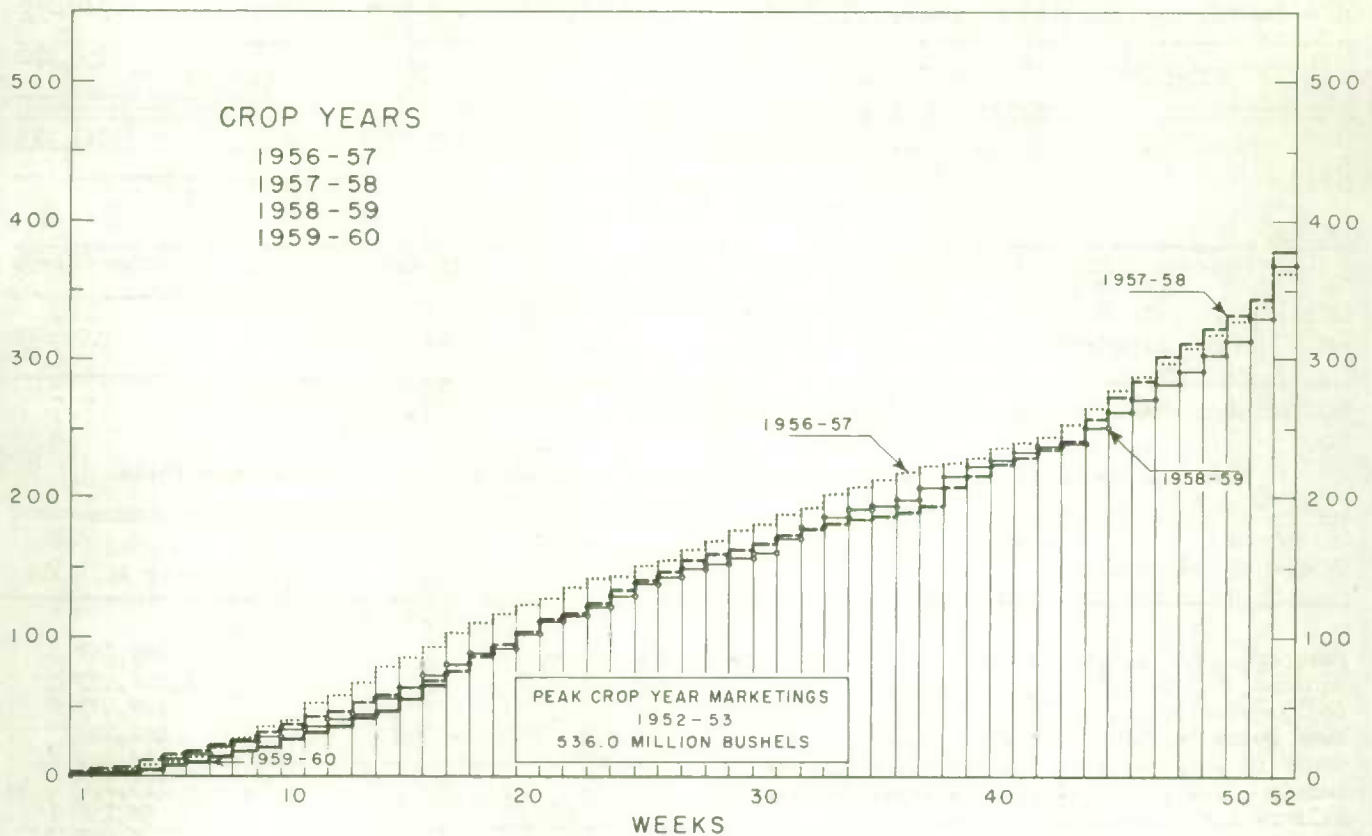
Grade	Crop Year		August-October			
	Average					
	1953-54- 1957-58	1958-59	1958		1959	
	per cent	per cent	cars	per cent	cars	per cent
No. 1 Man. Northern ..	3.4	1.8	233	0.6	851	1.6
No. 2 Man. Northern ..	32.8	31.9	12,753	31.8	16,061	30.7
No. 3 Man. Northern ..	25.7	27.5	11,690	29.1	14,996	28.6
No. 4 Man. Northern ..	11.5	15.7	6,156	15.3	9,248	17.7
No. 5 Wheat	9.1	6.7	6,215	15.5	2,055	3.9
No. 6 Wheat	3.0	0.8	508	1.3	196	0.4
Feed Wheat	0.4	1/	20	1/	5	1/
Others Red Spring	9.0	10.7	1,432	3.6	3,846	7.3
C.W. Garnet	0.5	1/	1	1/	63	0.1
C.W. White Spring	0.1	0.1	55	0.1	33	0.1
C.W. Mixed Wheat	0.1	1/	19	1/	16	1/
Alberta Winter	0.4	0.1	108	0.3	548	1.0
Nos. 1-6 C.W. Amber Durum	3.9	4.4	922	2.3	4,305	8.2
Others C.W. Amber Durum	0.1	0.2	30	0.1	130	0.2
Totals	100.0	100.0	40,142	100.0	52,353	100.0
Gross bushels (approx.)			74,223,000		98,756,000	

1/ Less than .05 per cent.

WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT



CUMULATIVE RECORD OF WHEAT MARKETINGS IN THE PRAIRIE PROVINCES BY WEEKS



(Data in both charts for crop years beginning August 1)

Lake Shipments of Canadian Grain from the Opening of Navigation
to November 18, 1959 and to Approximately the Same Date 1949-1958*

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1949	150,756	38,553	31,769	12,109	8,363	241,552
1950	111,378	21,067	22,827	4,202	3,303	162,778
1951	161,641	50,255	40,004	6,422	1,767	260,088
1952	203,332	76,566	87,864	6,453	5,666	379,882
1953	187,441	86,386	102,234	15,547	5,848	397,457
1954	116,051	50,817	73,006	6,750	4,147	250,770
1955	115,610	28,727	57,984	10,083	7,837	220,241
1956	179,241	40,583	81,464	10,174	9,558	321,020
1957	134,292	41,831	50,001	4,147	10,620	240,891
1958	161,762	39,780	66,459	5,242	7,991	281,233
1959	154,315	28,875	45,815	4,651	6,131	239,787

* Shipments from opening of navigation to November 17, 1949; November 16, 1950; November 15, 1951; November 20, 1952; November 19, 1953; November 17, 1954; November 16, 1955; November 21, 1956; November 20, 1957; and November 19, 1958.

Wheat Shipments* to the United States by Destination August 1-November 18, 1959
Compared with Approximately the Same Period 1957 and 1958

Destination	1957	1958	1959
- bushels -			
<u>By Vessel</u>			
Buffalo	1,210,576	108,614	110,305
Chicago	156,933	175,436	-
Duluth-Superior	803,427	545,605	250,910
Totals, Vessel	2,170,936	829,655	361,215
<u>By Rail</u>			
U.S.A. Domestic Points	280,367	135,122	48,276
Totals, Shipments	2,451,303	964,777	409,491

* Either for re-export or retention for domestic use.

Rail Shipments of Wheat to Maritime Ports from Bay, Lake and Upper St. Lawrence Ports

Origin of Shipments	August 1 - October 31, 1958	August 1 - October 31, 1959
- bushels -		
Port McNicoll	371,619	889,252
Midland, Tiffin	827,425	1,362,473
Collingwood	-	107,073
Owen Sound	57,619	192,348
Goderich	14,000	628,349
Sarnia	-	115,240
Walkerville	-	98,156
Prescott	-	2,000
Totals	1,270,663	3,394,891

Rail Shipments of Wheat from Fort William-Port Arthur, 1956-57--1959-60

Month	1956-57	1957-58	1958-59	1959-60
	- bushels -			
August	100,667	33,297	33,123	34,383
September	70,324	42,125	15,692	31,690
October	120,535	34,937	68,834	30,904
November	240,628	67,894	205,061	
December	613,482	232,252	214,398	
January	792,000	525,238	684,845	
February	490,778	178,204	173,387	
March	338,534	191,312	280,705	
April	161,103	215,546	243,292	
May	73,212	33,839	44,783	
June	23,281	35,368	10,128	
July	31,432	37,984	33,696	
Totals	3,055,976	1,627,996	2,007,944	

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur, October 1959

Grade	Quebec	Ontario
	- bushels -	
4 Northern	2,833	6,000
Tough	12,000	-
Rejected	3,771	-
Amber Durum	6,000	-
Others	-	300
Totals	24,604	6,300

Overseas Exports of Canadian Grain by Ports of Loading, August 1-November 18, 1959
with Comparisons

Ports	Wheat 1/	Oats	Barley	Rye	Flaxseed	Rapeseed 2/
	- bushels -					
<u>Pacific Seaboard</u>						
Vancouver-New Westminster	23,738,561	208,056	5,657,737	-	1,028,899	252,157
Victoria	163,931	14,889	-	-	-	-
Prince Rupert	-	-	3,081,867	-	-	-
<u>Churchill</u>	21,158,712	138,353	-	-	-	-
<u>Lakehead Direct</u>	3,758,822	197,647	147,513	-	947,725	-
<u>St. Lawrence</u>						
Montreal	19,190,072	649,764	47,125	79,856	1,279,785	23,694
Sorel	6,925,362	-	-	-	-	-
Three Rivers	4,507,360	-	-	-	-	-
Quebec	2,866,293	-	-	-	-	-
<u>Maritime</u>						
West Saint John	166,000	-	-	-	-	-
Totals	82,475,113	1,208,709	8,934,242	79,856	3,256,409	275,851
August 1-November 19, 1958	75,740,517	1,444,243	11,420,951	551,677	3,870,492	1,009,214

1/ Excluding bagged seed.

2/ In bushels of 50 pounds.

Freight Assistance Shipments Claims filed for payment up to October 31, 1959 represent the movement of some 3,267 thousand bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance policy during the August-September period of the 1959-60 crop year. During the same months of the 1958-59 crop year claims had been filed for a total of 3,498 thousand bushels, indicating on the assumption of approximately the same rate of submission of claims during both the current and preceding crop years that the August-September shipments of wheat under the policy were running about 7 per cent below those of 1958-59. Revised data on the 1958 August-September shipments of wheat based on claims submitted up to October 31, 1959 place the two-month total at 4,261 thousand bushels. The bulk of the shipments during the current two-month period under review went to destinations in Ontario and Quebec.

Provincial Distribution of Wheat Shipments under the Freight Assistance Policy
August-September 1959 and 1958

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1959	15	27	126	51	628	851	173	1,871
September	9	10	68	96	508	606	99	1,396
Totals	24	37	194	147	1,136	1,458	272	3,267
Same period 1958:								
Preliminary 2/	21	43	210	109	1,318	1,549	248	3,498
Revised 1/	27	46	240	141	1,489	1,800	518	4,261

Preliminary data on millfeed shipments under the freight assistance policy indicate shipments of 87,097 tons during the August-September period of the current crop year. This total, based on claims submitted up to October 31, 1959 will most likely be subject to considerable upward revision with the filing of additional claims. Some indication of the possible size of the revision is given by the fact that by October 31, 1958 claims had been filed for only 68,463 tons out of a total of 91,492 tons shipped during the first two months of the 1958-59 crop year. As with freight-assisted shipments of wheat, the greater portion of the millfeed shipments during the period under review went to destinations in Ontario and Quebec.

Provincial Distribution of Millfeed Shipments under the Freight Assistance Policy
August-September 1959 and 1958

Province	1958		1959
	Preliminary 2/	Revised 1/	Preliminary 1/
- tons -			
Newfoundland	458	627	473
Prince Edward Island	1,143	1,324	1,290
Nova Scotia	3,615	4,478	3,672
New Brunswick	3,472	4,451	5,611
Quebec	37,308	47,777	50,110
Ontario	19,465	25,328	22,312
British Columbia	3,002	7,507	3,629
Totals	68,463	91,492	87,097

1/ Based on claims filed up to October 31, 1959.

2/ Based on claims filed up to October 31, 1958.

Monthly Exports of Canadian Wheat and Wheat Flour

Year and Month	Wheat in Bulk <u>1/</u>	Bagged Seed Wheat <u>2/</u>	Total Wheat	Wheat Flour <u>2/ 3/</u>	Total <u>3/</u> Wheat and Wheat Flour
- thousand bushels -					
<u>1957-58</u>					
August	24,716	184	24,900	2,686	27,586
September	21,166	194	21,360	3,059	24,420
October	17,915	71	17,985	3,472	21,457
November	27,906	233	28,139	3,307	31,446
December	19,900	455	20,355	3,209	23,564
January	18,843	834	19,677	3,166	22,842
February	18,562	740	19,303	2,764	22,067
March	19,443	984	20,427	3,814	24,241
April	22,787	330	23,118	3,957	27,074
May	35,266	33	35,299	3,742	39,041
June	26,905	114	27,019	3,862	30,881
July	22,283	47	22,330	3,343	25,673
Totals	275,693	4,219	279,912	40,381	320,293
<u>1958-59</u>					
August	23,152	237	23,389	2,443	25,833
September	16,112	201	16,314	2,232	18,546
October	25,532	188	25,720	3,656	29,375
November	21,437	299	21,736	3,921	25,658
December	19,864	451	20,315	3,196	23,511
January	17,893	607	18,500	2,820	21,320
February	17,635	956	18,641	3,035	21,676
March	18,579	1,280	19,859	2,705	22,564
April	18,918	738	19,657	3,057	22,714
May	29,040	31	29,071	3,529	32,600
June	27,842	72	27,913	3,003	30,916
July	16,101	204	16,305	3,529	19,834
Totals	252,155	5,266	257,421	37,125	294,546
<u>1959-60 <u>4/</u></u>					
August	21,203	124	21,328	3,194	24,522
September	22,606	155	22,761	3,547	26,308
October	22,440	89	22,529	3,059	25,589
Totals	66,250	368	66,618	9,801	76,419

1/ Export clearances including shipments to the United States compiled by the Statistics Branch, Board of Grain Commissioners for Canada. 2/ Compiled from Canadian Customs returns, 1957-58 and 1958-59 adjusted to remove effect of time lag in reporting. 3/ In terms of wheat equivalent. Wheat flour conversion rate: 2.3 bushels per cwt. 4/ Subject to revision. Unadjusted Customs returns.

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Year 1958-59

Destination	Wheat 1/	Wheat Flour 2/	Total Wheat 1/ and Wheat Flour 2/
<u>COMMONWEALTH COUNTRIES</u>			
		- bushels -	
United Kingdom	87,032,155	13,855,251	100,887,406
<u>Africa</u>			
British East Africa	-	1,426	1,426
Federation of Rhodesia and Nyasaland ...	126,933	25,431	152,364
Gambia	-	16,118	16,118
Ghana	-	1,385,253	1,385,253
Nigeria	-	203,244	203,244
Sierra Leone	-	292,535	292,535
Union of South Africa	7,631,138	-	7,631,138
<u>Asia</u>			
Ceylon	-	2,239,926	2,239,926
Hong Kong	131,601	609,691	741,292
India	11,381,051	1,955	11,383,006
Malaya and Singapore	-	459,057	459,057
Other British East Indies	-	1,739	1,739
Pakistan	3,824,239	345	3,824,584
<u>Europe</u>			
Gibraltar	-	44,565	44,565
Malta	900,146	-	900,146
<u>North America</u>			
Bahamas	-	262,734	262,734
Barbados	833	313,163	313,996
Bermuda	-	112,422	112,422
British Honduras	-	19,743	19,743
Jamaica	-	1,647,623	1,647,623
Leeward and Windward Islands	33	1,035,356	1,035,389
Trinidad and Tobago	673	1,627,742	1,628,415
<u>Oceania</u>			
Fiji	-	16,882	16,882
<u>South America</u>			
British Guiana	-	198,470	198,470
Totals, Commonwealth Countries	111,028,802	24,370,671	135,399,473
<u>FOREIGN COUNTRIES</u>			
<u>Africa</u>			
Azores and Madeira	-	30,337	30,337
Belgian Congo	-	637,482	637,482
Egypt	-	148,069	148,069
Liberia	-	19,177	19,177
Morocco	-	2,974	2,974
Portuguese East Africa	234,565	4,740	239,305
Portuguese West Africa	-	85,340	85,340
<u>Asia</u>			
Arabia	-	54,804	54,804
Burma	40,070	-	40,070
China	463,867	-	463,867
Formosa	7,616	-	7,616
Iran	-	448	448
Israel	1,560,534	-	1,560,534
Japan	40,957,400	1,169,702	42,127,102
Jordan	-	92	92
Lebanon	56,000	878,099	934,099
Nepal	36,543	-	36,543
Okinawa	478,426	-	478,426
Philippine Islands	1,166,667	3,034,659	4,201,326
Portuguese Asia	-	221,092	221,092
Syria	-	3,128	3,128
Thailand	-	335,892	335,892

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Year 1958-59

Destination	Wheat 1/	Wheat Flour 2/	Total Wheat 1/ and Wheat Flour 2/
- bushels -			
<u>FOREIGN COUNTRIES</u>			
<u>Europe</u>			
Austria	2,974,833	-	2,974,833
Belgium	10,654,704	231,973	10,886,677
Denmark	432,954	2,392	435,346
Finland	173,612	-	173,612
France	1,352,435	-	1,352,435
Germany, Federal Republic	34,983,696	-	34,983,696
Greece	-	4,719	4,719
Iceland	-	14,819	14,819
Ireland	4,120,833	-	4,120,833
Italy	1,010,176	2,019	1,012,195
Italy (Vatican City)	91,863	-	91,863
Netherlands	7,853,201	5,796	7,858,997
Norway	3,574,728	-	3,574,728
Poland	5,408,331	-	5,408,331
Portugal	-	56,654	56,654
Sweden	29,867	2,024	31,891
Switzerland	6,276,779	-	6,276,779
U.S.S.R. (Russia)	7,308,187	-	7,308,187
<u>North America</u>			
American Virgin Islands	-	345	345
Costa Rica	41,286	486,282	527,568
Cuba	1,918	377,292	379,210
Dominican Republic	1,000	668,350	669,350
El Salvador	33,063	378,806	411,869
French West Indies	-	8,234	8,234
Guatemala	83,333	258,845	342,178
Haiti	-	48,047	48,047
Honduras	8,333	79,247	87,580
Netherlands Antilles	-	158,029	158,029
Nicaragua	-	315,242	315,242
Panama	-	302,416	302,416
St. Pierre and Miquelon	-	20,684	20,684
United States			
Flour in terms of wheat	-	1,649,509	1,649,509
For milling in bond 3/	1,408,216	-	1,408,216
For domestic use 3/	1,953,931	-	1,953,931
<u>Oceania</u>			
French Oceania	-	920	920
Guam	-	1,208	1,208
<u>South America</u>			
Chile	-	34,730	34,730
Colombia	14,875	251,649	266,524
Ecuador	1,123,042	-	1,123,042
Peru	1,943,068	23,347	1,966,415
Surinam	-	95,393	95,393
Venezuela	2,899,989	649,237	3,549,226
<u>Wrecked</u>	366,200	-	366,200
Totals, Foreign Countries	141,126,141	12,754,243	153,880,384
Sub-Totals, All Countries	252,154,943	37,124,914	289,279,857
Bagged seed wheat 4/	5,265,663	-	5,265,663
Totals, All Countries	257,420,606	37,124,914	294,545,520

- 1/ Overseas clearances as reported by the Statistics Branch, Board of Grain Commissioners for Canada, for all countries except the United States. 2/ Adjusted to remove effect of time lag in the returns made by Customs. In terms of wheat equivalent. Source: Canadian Customs returns. Conversion rate: 2.3 bushels per cwt. 3/ Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents. 4/ Adjusted to remove effect of time lag in the returns made by Customs.

Exports of Canadian Wheat and Wheat Flour by Destination 1959-60

Destination	July	October		August-October	
	Wheat Flour 1/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	1,196,598	1,031,060	6,951,811	3,476,827	24,657,052
<u>Africa</u>					
British East Africa	736	690	-	2,036	-
Federation of Rhodesia and Nyasaland ...	5,175	1,288	-	6,063	-
Gambia	-	-	-	6,707	-
Ghana	143,778	242,167	-	617,828	-
Nigeria	35,753	58,135	-	157,927	-
Sierra Leone	47,732	37,058	-	142,315	-
Union of South Africa	-	-	292,307	-	1,573,400
<u>Asia</u>					
Ceylon	771,769	-	-	771,770	-
Hong Kong	57,903	58,144	36,400	188,979	55,067
India	-	-	2,199,560	-	3,710,436
Malaya and Singapore	47,171	50,156	-	154,142	-
<u>Europe</u>					
Gibraltar	7,728	2,576	-	15,456	-
Malta	-	-	37,333	-	408,800
<u>North America</u>					
Bahamas	15,992	40,880	-	103,656	-
Barbados	30,659	21,823	-	74,801	-
Bermuda	5,992	21,956	-	41,239	-
British Honduras	2,136	807	-	3,937	-
Jamaica	117,645	126,086	-	343,829	-
Leeward and Windward Islands	72,337	91,308	-	241,254	-
Trinidad and Tobago	137,653	184,324	-	521,403	-
<u>Oceania</u>					
Fiji	2,001	3,944	-	6,141	-
<u>South America</u>					
British Guiana	29,723	33,959	-	105,901	-
Totals, Commonwealth Countries	2,728,481	2,006,361	9,517,411	6,982,211	30,404,755
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	10,173	2,496	-	2,496	-
Belgian Congo	99,441	55,970	-	154,999	-
Liberia	6,120	2,509	-	6,992	-
Portuguese East Africa	920	-	-	1,265	-
Portuguese West Africa	13,108	7,958	-	25,857	-
<u>Asia</u>					
Arabia	2,737	-	-	1,762	-
Burma	-	-	-	-	228,470
Indonesia	-	51,520	-	51,520	-
Iran	-	382	-	382	-
Iraq	-	-	1,249,229	-	2,033,229
Japan	112,845	57,141	2,525,050	232,272	10,267,502
Lebanon	2,284	2,730	-	3,174	386,690
Okinawa	-	-	58,053	-	156,053
Philippine Islands	86,128	410,969	-	1,057,400	466,667
Portuguese Asia	35,146	17,452	-	39,744	-
Syria	-	515	-	515	-
Thailand	24,851	63,896	-	124,402	-

Exports of Canadian Wheat and Wheat Flour by Destination 1959-60

Destination	July	October		August-October	
	Wheat Flour 1/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>FOREIGN COUNTRIES</u>					
<u>Europe</u>					
Austria	-	-	369,600	-	542,590
Belgium	-	8,372	1,072,075	8,372	3,066,513
Denmark	460	2,006	-	2,466	18,667
Finland	-	-	-	-	520,622
France	-	-	962,313	-	962,313
Germany, Federal Republic	-	-	3,343,900	-	6,105,530
Greece	-	759	-	759	-
Iceland	1,610	-	-	2,300	-
Ireland	-	-	324,987	-	408,987
Italy	-	-	545,067	-	820,872
Netherlands	230	-	1,003,780	2,035	3,520,397
Norway	-	-	122,333	-	1,148,373
Portugal	1,930	3,503	-	5,502	-
Sweden	1,012	-	18,666	1,012	18,666
Switzerland	-	-	28,701	-	1,620,933
<u>North America</u>					
Costa Rica	30,072	70,012	-	156,147	-
Cuba	81,291	8,809	1,000	61,327	1,000
Dominican Republic	62,447	39,696	-	128,908	-
El Salvador	14,665	42,435	-	120,051	-
French West Indies	575	230	-	920	-
Guatemala	14,205	10,808	-	47,590	20,000
Haiti	230	-	-	207	-
Honduras	11,553	4,278	-	15,267	1,667
Netherlands Antilles	15,514	6,233	-	32,683	-
Nicaragua	20,010	18,319	-	67,866	-
Panama	24,150	43,017	-	81,926	-
St. Pierre and Miquelon	460	2,235	-	6,603	-
United States					
Flour in terms of wheat	101,138	113,882	-	354,204	-
For milling in bond 4/	-	-	-	-	110,000
For domestic use 4/	-	-	99,180	-	241,031
<u>Oceania</u>					
French Oceania	-	186	-	186	-
<u>South America</u>					
Chile	16,100	-	-	920	-
Colombia	345	863	-	1,325	793,508
Ecuador	-	-	101,035	-	424,242
Peru	920	-	713,067	1,380	1,255,334
Surinam	7,627	3,713	-	15,569	-
Venezuela	425	-	384,870	506	704,996
Totals, Foreign Countries	800,722	1,052,894	12,922,906	2,818,811	35,844,852
Sub-Totals, All Countries	3,529,203	3,059,255	22,440,317	9,801,022	66,249,607
Bagged seed wheat 5/			89,086		368,350
Totals, All Countries	3,529,203	3,059,255	22,529,403	9,801,022	66,617,957

1/ In terms of wheat equivalent. Adjusted to remove effect of time lag in the returns made by Customs. Conversion rate: 2.3 bushels per cwt. 2/ In terms of wheat equivalent. Unadjusted Canadian Customs returns. Conversion rate: 2.3 bushels per cwt. 3/ Overseas clearances as reported by the Statistics Branch, Board of Grain Commissioners for Canada, for all countries except the United States. Subject to revision. 4/ Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents. Excluding bagged seed. 5/ Unadjusted Canadian Customs returns.

Canadian Wheat Board Weekly Average Cash Wheat Prices
Basis in Store Fort William-Port Arthur

Class and Grade	Week Ending				
	October 30	November 6	November 13	November 20	November 27

- cents and eighths per bushel -

Initial Payment to Producers

1 Northern	140	140	140	140	140
2 Northern	136	136	136	136	136
3 Northern	132	132	132	132	132
4 Northern	125	125	125	125	125
5 Wheat	108	108	108	108	108
6 Wheat	102	102	102	102	102
Feed Wheat	96	96	96	96	96
1 C.W. Garnet	122	122	122	122	122
2 C.W. Garnet	117	117	117	117	117
1 Alberta Red Winter	124	124	124	124	124
2 Alberta Winter	119	119	119	119	119
1 C.W. Amber Durum	140	140	140	140	140
2 C.W. Amber Durum	136	136	136	136	136
3 C.W. Amber Durum	132	132	132	132	132

International Wheat Agreement
and Domestic Sales

1 Northern	163/7	163/7	164	165/1	165/2
2 Northern	159/7	159/7	161	162/1	162/2
3 Northern	152/7	152/7	154	155/1	155/2
4 Northern	147/1	147/7	149	150/1	150/2
5 Wheat	144/1	144/7	146	147/1	147/2
6 Wheat	142/1	142/7	144	145/1	145/2
Feed Wheat	140/1	140/7	142	143/1	143/2
1 C.W. Garnet	151/7	151/7	153	154/1	154/2
2 C.W. Garnet	147/7	147/7	149	150/1	150/2
3 C.W. Garnet	144/7	144/7	146	147/1	147/2
1 Alberta Red Winter	152/7	152/7	154	155/1	155/2
2 Alberta Winter	147/7	147/7	149	150/1	150/2
3 Alberta Winter	143/7	143/7	145	146/1	146/2
1 C.W. Amber Durum	174/7	174/7	175	176/1	176/2
2 C.W. Amber Durum	168/7	168/7	169	170/1	170/2
3 C.W. Amber Durum	162/6	162/7	163	164/1	164/2

Export - Class II

1 Northern	163/7	163/7	164	165/1	165/2
2 Northern	159/7	159/7	161	162/1	162/2
3 Northern	152/7	152/7	154	155/1	155/2
4 Northern	147/1	147/7	149	150/1	150/2
5 Wheat	144/1	144/7	146	147/1	147/2
6 Wheat	142/1	142/7	144	145/1	145/2
Feed Wheat	140/1	140/7	142	143/1	143/2
1 C.W. Garnet	151/7	151/7	153	154/1	154/2
2 C.W. Garnet	147/7	147/7	149	150/1	150/2
3 C.W. Garnet	144/7	144/7	146	147/1	147/2
1 C.W. Amber Durum	174/7	174/7	175	176/1	176/2
2 C.W. Amber Durum	168/7	168/7	169	170/1	170/2
3 C.W. Amber Durum	162/6	162/7	163	164/1	164/2

Canadian Wheat Board Weekly Average Cash Wheat Prices
Basis in Store Vancouver

Class and Grade	Week Ending				
	October 30	November 6	November 13	November 20	November 27

- cents and eighths per bushel -

Initial Payment to Producers

1 Northern	140	140	140	140	140
2 Northern	136	136	136	136	136
3 Northern	132	132	132	132	132
4 Northern	125	125	125	125	125
5 Wheat	108	108	108	108	108
6 Wheat	102	102	102	102	102
Feed Wheat	96	96	96	96	96
1 C.W. Garnet	122	122	122	122	122
2 C.W. Garnet	117	117	117	117	117
1 Alberta Red Winter	124	124	124	124	124
2 Alberta Winter	119	119	119	119	119
1 C.W. Amber Durum	140	140	140	140	140
2 C.W. Amber Durum	136	136	136	136	136
3 C.W. Amber Durum	132	132	132	132	132

International Wheat Agreement
and Domestic Sales

1 Northern	172/2	172/2	171/4	172/4	172/5
2 Northern	168/2	168/2	168/4	169/4	169/5
3 Northern	161/2	161/2	161/4	162/4	162/5
4 Northern	155/2	155/2	156/4	157/4	157/5
5 Wheat	152/2	152/2	153/4	154/4	154/5
6 Wheat	150/2	150/2	151/4	152/4	152/5
Feed Wheat	148/2	148/2	149/4	150/4	150/5
1 C.W. Garnet	152/2	152/2	153/4	154/4	154/5
2 C.W. Garnet	148/2	148/2	149/4	150/4	150/5
3 C.W. Garnet	145/2	145/2	146/4	147/4	147/5
1 Alberta Red Winter	155/2	155/2	156/4	157/4	157/5
2 Alberta Winter	151/2	151/2	152/4	153/4	153/5
3 Alberta Winter	146/2	146/2	147/4	148/4	148/5

Export - Class II

1 Northern	172/2	172/2	171/4	172/4	172/5
2 Northern	168/2	168/2	168/4	169/4	169/5
3 Northern	161/2	161/2	161/4	162/4	162/5
4 Northern	155/2	155/2	156/4	157/4	157/5
5 Wheat	152/2	152/2	153/4	154/4	154/5
6 Wheat	150/2	150/2	151/4	152/4	152/5
Feed Wheat	148/2	148/2	149/4	150/4	150/5
1 C.W. Garnet	152/2	152/2	153/4	154/4	154/5
2 C.W. Garnet	148/2	148/2	149/4	150/4	150/5
3 C.W. Garnet	145/2	145/2	146/4	147/4	147/5
1 Alberta Red Winter	155/2	155/2	156/4	157/4	157/5
2 Alberta Winter	151/2	151/2	152/4	153/4	153/5
3 Alberta Winter	146/2	146/2	147/4	148/4	148/5

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during October 1959 amounted to 3,820,000 hundredweight, 16 per cent greater than the September 1959 output of 3,303,000 hundredweight, 1 per cent above the October 1958 output of 3,792,000 hundredweight, but relatively unchanged from the ten-year (1949-1958) average production for the month of October of 3,819,000 hundredweight. Mills reporting operations during October 1959 had a total rated capacity of 169,000 hundredweight per 24-hour day and on the basis of a 26-day working period 86.7 per cent of this rated capacity was effective.

Wheat milled for flour during October 1959 amounted to 8,654,000 bushels compared with 7,518,000 bushels milled during the previous month and 8,571,000 bushels milled during October 1958. Of the wheat milled for flour during October 1959, some 7,839,000 bushels were Western Canadian Spring wheat (other than Durum) while the remainder consisted of Ontario Winter wheat (495,000 bushels); Durum (221,000 bushels); and all other (98,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during October 1959 amounted to 1,330,000 hundredweight (3,059,000 bushels of wheat equivalent) representing a decrease of 14 per cent from the 3,547,000 bushels exported during the preceding month and 16 per cent lower than the adjusted October 1958 figure of 3,656,000 bushels. Flour shipments during the month went to forty-nine countries with exports to the United Kingdom amounting to 1,031,000 bushels of wheat equivalent and accounting for 34 per cent of the October 1959 total. Other leading markets for Canadian wheat flour during the month, with shipments in thousands of bushels of wheat equivalent were as follows: Philippine Islands, 411; Ghana, 242; Trinidad and Tobago, 184; Jamaica, 126; and United States, 114.

Wheat Milled for Flour, and Production and Exports of Wheat Flour, Canada

Crop Year	Wheat Milled for Flour	Wheat Flour	
		Production	Exports ^{1/}
	- bushels -		- cwt. -
1935-36-1939-40 average	67,845,114	29,405,451	9,603,941
1940-41-1944-45 average	99,704,638	43,908,245	23,699,546
1945-46-1949-50 average	107,330,372	47,011,540	25,819,721
1950-51-1954-55 average	100,446,328	43,847,894	21,812,041
1955-56	91,770,025	40,148,750	17,391,300
1956-57	85,149,373	37,623,446	14,582,431
1957-58	92,288,897	40,819,678	17,556,886
1958-59	90,142,957	39,826,493	16,141,267
1959-60 ^{2/}			
August	7,523,126	3,306,994	1,388,882
September	7,517,811	3,302,796	1,542,321
October	8,653,520	3,820,134	1,330,111
Totals	23,694,457	10,429,924	4,261,314
Same months 1958-59 (revised)	22,788,234	10,055,207	3,622,047

^{1/} Based on Customs returns. Exports for the crop years 1945-46-1958-59 revised to remove effect of time lag in reporting.

^{2/} Subject to revision.

UNITED STATES SITUATION

Supply Position Domestic supplies of wheat in the United States for the 1959-60 crop year are estimated at 2,394.2 million bushels, consisting of the July 1 carryover of 1,276.7 million and the 1959 crop, estimated as at October 1, at 1,117.4 million bushels. Domestic supplies of the size indicated would be 2 per cent greater than the previous peak of 2,343.3 million bushels a year ago. Imports of wheat from Canada during the July-October period of the current United States crop year amounted to 1.1 million bushels. After deducting an estimated 629.0 million bushels for anticipated domestic requirements, some 1,766.2 million remain available for export and for carryover during 1959-60 compared with 1,713.9 million in 1958-59.

United States Wheat Supplies

Item	1958-59	1959-60 <u>1/</u>
- million bushels -		
Carryover at beginning of crop year (July 1)	881.0	1,276.7
New crop	1,462.2	1,117.4
Total estimated domestic supplies	2,343.3	2,394.2
Imports of wheat and wheat flour in terms of wheat for domestic use, July-October	1.6 <u>2/</u>	1.1
Total estimated supplies <u>3/</u>	2,344.9	2,395.2
Less estimated domestic requirements for crop year <u>4/</u>	631.0	629.0
Available for export and for carryover	1,713.9	1,766.2
Deduct:		
Exports of wheat as grain, July-October	110.7	108.0
Exports of wheat flour and products in terms of wheat, July-October <u>5/</u>	23.9	27.4
Total exports of wheat, wheat flour and products <u>6/</u>	134.7	135.4
Balance on November 1 for export and for carryover ..	1,579.2	1,630.8

- 1/ Preliminary. 2/ Revised. 3/ Excluding imports for November-June.
4/ Includes allowances for shipments of United States wheat and wheat products to Alaska, Hawaii, Puerto Rico, Guam, Samoa, Virgin Islands and Wake Island. These shipments are not included in exports as set out in the table. 5/ Flour exports exclude "Milled in bond". 6/ These figures now include all shipments under relief programs which formerly were not available from Census data.

Exports of wheat, wheat flour and other products in terms of grain equivalent during the first four months (July-October) of the 1959-60 United States crop year amounted to 135.4 million bushels, relatively unchanged from the 134.7 million exported during the same months in 1958. The balance remaining on November 1, 1959 for export and for carryover was estimated at 1,630.8 million bushels compared with 1,579.2 million on the same date a year ago.

The Wheat Situation
for 1959-60

Mr. Robert E. Post, of the Agricultural Economics Division, United States Department of Agriculture, speaking at the 37th Annual Agricultural Outlook Conference, Washington D.C. on November 18, said in part as follows: the total U.S. wheat supply for the marketing year beginning July 1, 1959, estimated at 2,404 million bushels (including an allowance for estimated imports for the crop year), is an all-time record. It exceeds the previous peak last year by about 50 million bushels, or 2 per cent, and the 1957-58 year by about 535 million bushels, or 28 per cent. A sharp increase in the carryover from last year more than offsets a 24 per cent reduction in this year's crop.

Yields per harvested acre in 1959 of 21.0 bushels were below the all-time record of 27.3 bushels last year, but still the third largest of record. The 21.0 bushels this year is a sixth above the 1948-1957 average of 18.0 bushels. Farmers harvested 53.2 million acres in 1959, only a third of a million acres less than in 1958. Production of 1,117 million bushels was a fourth less than the record crop in 1958 of 1,462 million bushels but still 4 per cent above the 1948-1957 average.

So much for supply. Domestic disappearance in 1959-60 is estimated to total about the same as the 629 million bushels last year. Exports are expected to total about 410 million bushels, somewhat smaller than the 443 million exported in 1958-59. On the basis of the estimates of supply and disappearance, the carryover July 1, 1960 would total about 1,365 million bushels. This would be 7 per cent above the 1,279 million bushels July 1, 1959 and 55 per cent above the 881 million on July 1, 1958.

Losses in United States exports are expected to be the greatest in sales to traditional dollar markets of Western Europe. Shipments under Government export programs, on the other hand, should hold to last year's level or even increase slightly.

Domestic prices continue to exceed world prices. Virtually all United States wheat exports require export payments. In the case of wheat grain these export payments are paid in grain; flour payments are still in cash. Shipments under export programs, to which I just referred, are in addition to these payments. The special Government programs, including sales for foreign currencies, barter and various donation programs, have materially increased the size of our exports. Of the total exports in 1958-59, 68.2 per cent moved under these special programs; this was an increase over the 62.0 per cent in the previous year and the 60.8 per cent, the average of the past 5 years.

The principal factor expected to cause a reduction in U.S. exports this year is increased competition from other exporters. Australia and France have much more wheat available for export this year than last. Their wheats are similar in quality to those offered by the U.S. and their traditional outlets have also been important cash customers for U.S. wheat. A few exporting countries, such as Italy and Argentina, will have less to export this year than in 1958-59, but this will not be sufficient to offset the increased export availabilities that exist elsewhere.

Analysis of Wheat
by Classes

This year, special attention has been given to supply and distribution by classes and prices by classes. Hard red winter wheat is grown principally in the Southern Great Plains and hard red spring chiefly in the Northern Great Plains. These hard wheats

are especially suited to the making of bread flours.

While most of you know the uses of the different classes of wheat, there might be some of you who are not familiar with the uses of the types of wheat grown in other than your immediate areas.

Soft red winter wheat is produced in the eastern half of the United States and white wheat predominates in the Pacific Northwest, with important districts also in Michigan, New York and California. Flours from soft red and soft white wheats are used in the making of pastry, crackers, biscuits and cakes. Durum wheat is grown principally in North Dakota and adjoining States. This type of wheat is used in the manufacture of macaroni, spaghetti, and similar products.

Carryover stocks of hard red winter wheat, which make up around three-quarters of the total United States carryover of wheat, increased sharply between July 1, 1958 and 1959. Of the total increases in the United States carryover of about 400 million bushels, 80 per cent of the increase was in hard red winter. Stocks of hard red spring, white and soft red winter had moderate increases. Durum stocks decreased.

Analysis shows a further substantial increase in the prospective carryover of hard red winter wheat next July 1. On the other hand, indications are that there may be little or no change in the prospective carryover of soft red winter and moderate reductions in the prospective carryover stocks of hard red spring, durum and white wheat.

In order to show the relative magnitude of the July 1, 1959 carryover stocks of the various classes, let us compare the carryover of each with the 1954-1958 average total disappearance (domestic and export). The carryover of hard red winter wheat is over twice its average disappearance, and that of hard red spring over a third larger than its average disappearance. Stocks of the other classes are less than their average disappearance; stocks of durum were nine-tenths of disappearance, those of white only a little over a third of disappearance and those of soft red winter only about a tenth of disappearance.

Hard red winter wheat supplies present the greatest problem, not because we do not use large quantities or export large quantities, rather because our production is so large. Of the total wheat consumed as food in the United States, 40 per cent is hard red winter. Exports of hard red winter make up half of our total exports.

While the general level of wheat prices is related to the support level, the price of each class of wheat reflects its own supply and demand situation. The price of soft red winter wheat usually averages above the price of hard red winter, but large crops of soft red winter resulted in depressed prices of that type in 1952-1955. The price of No. 1 Dark Northern Spring wheat at Minneapolis in the past 10 years averaged 9 cents above that of No. 2 Hard Winter at Kansas City. The price of white wheat at Portland was high relative to other markets in 1956 and 1957 as a result of the unusual export demand created largely by the P.L. 480 program at a time when dollar exports to Japan were large.

The Wheat Supply
Outlook for
1960-61

With the minimum national allotment of 55 million acres in effect for 1960, it is estimated that a little more than 53 million acres may be harvested. In 1959, 53.2 million acres were harvested. Rainfall in the Great Plains has provided

generous soil moisture supplies for the winter wheat crop, but at the same time has delayed seeding. Should the 1956-1959 average yield of 22.6 bushels be obtained, a crop of about 1.2 billion bushels would be produced. A crop of this size would be about 8 per cent larger than the 1959 crop and would again exceed domestic requirements and exports, resulting in a further increase in the carryover. With domestic disappearance and exports the same as those estimated for 1959-60 and allowing for small imports, the carryover July 1, 1961 would be increased by about 170 million bushels over the estimated carryover July 1, 1960.

The Price Situation
and Outlook

Since harvest this year, wheat prices have been higher than usual relative to support levels. The strength this year reflects the large quantities withheld from the market and a crop that is smaller than last year. Because prices have risen to near or above the effective support level, further advances may be less than usual. Markets may display some temporary weakness at times. Farmers who have been withholding 1959 wheat from market because of large sales earlier in the year from the 1958 record production, may market in substantial quantities at the beginning of the new tax year.

Reflecting the market strength this year, U.S. prices to farmers in 1959-60 may average slightly higher than the \$1.72 for last year, even though the support price of \$1.81 is down 1 cent.

The "advance" minimum national average support price of \$1.77 per bushel for 1960-crop wheat was announced on July 8. The average support price for the 1959 crop was \$1.81 and for 1958-crop wheat, \$1.82. The \$1.77 per-bushel minimum average support for 1960-crop wheat is based on the July 1959 modernized parity price of \$2.36 per bushel (announced June 30). This "advance" minimum price will not be reduced but could be raised if the parity price at the beginning of the 1960 marketing year is higher.

Cont'd. from page 14

It is susceptible to leaf rust and therefore not suitable for the rust area. Canthatch will be distributed in the parts of Saskatchewan west of the third Meridian and east of the third Meridian but north of Township 30.

Since this is the first release of these two varieties, seed stocks can be obtained only from the Canada Department of Agriculture. All seed distributed by the department will carry an official tag and seal.

Farmers may purchase not less than one and a half bushels nor more than 12 bushels of seed. Most of it will be registered, but there may be some certified and commercial. Prices will range from \$4.50 to \$2.50 per bushel, depending on grade.

Basis of distribution is one allotment of seed of one variety only, to each farm or farmer in the respective areas of distribution as long as the supply lasts. A farmer is defined as a man or woman of full legal age who owns and operates a parcel or tract of land. Those who merely own a farm do not necessarily qualify.

Order forms may be obtained by writing: Mr. A.B. Masson, Seed Office, Research Branch, Canada Department of Agriculture, 518 Federal Building, Winnipeg. Instructions on how to order seed will be forwarded with the order forms.

United States Exports of Wheat and Flour by Country of Destination
July-September 1958 and 1959

NOTE

These data on exports by destination cover only the first three months of the United States crop year beginning July 1. The table on United States wheat supplies (see page 28) contains a preliminary estimate of total exports for the first four months of the United States crop year. Neither of these tables should be confused with the United States export figure shown on page one of this publication which, for comparative purposes, is based on the Canadian crop year beginning August 1.

Destination	July-September 1958			July-September 1959		
	Wheat	Flour 1/	Total	Wheat	Flour 1/	Total
- thousand bushels -						
<u>Western Hemisphere</u>						
British West Indies	4	883	887	15	494	509
Central America	131	978	1,109	585	866	1,451
Cuba	1,291	733	2,024	882	427	1,309
Brazil	5,936	-	5,936	10,955	-	10,955
Colombia	643	88	731	23	173	196
Peru	1,318	203	1,521	1,625	27	1,652
Venezuela	413	871	1,284	2,540	128	2,668
Others	1,090	1,199	2,289	1,503	1,334	2,837
Totals	10,826	4,955	15,781	18,128	3,449	21,577
<u>Europe</u>						
Austria	805	-	805	404	29	433
Belgium-Luxembourg	2,289	6	2,295	487	3	490
Finland	278	-	278	-	-	-
Germany, West	2,919	88	3,007	4,872	151	5,023
Italy	-	944	944	546	2,376	2,922
Netherlands	2,415	975	3,390	1,269	660	1,929
Norway	614	172	786	596	122	718
Poland	8,760	1	8,761	8,543	153	8,696
United Kingdom	6,251	998	7,249	4,659	284	4,943
Yugoslavia	6,666	471	7,137	5,479	932	6,411
Others	1,143	761	1,904	919	1,463	2,382
Totals	32,140	4,416	36,556	27,774	6,173	33,947
<u>Asia</u>						
Ceylon	-	111	111	-	2,034	2,034
India	19,441	7	19,448	19,789	11	19,800
Israel	2,039	2	2,041	2,598	67	2,665
Japan	7,521	524	8,045	6,088	679	6,767
Jordan	-	101	101	1,470	315	1,785
Korea	3,715	386	4,101	1,988	441	2,429
Lebanon	968	52	1,020	405	1,120	1,525
Philippines	247	1,642	1,889	149	986	1,135
Pakistan	895	-	895	1,717	125	1,842
Taiwan (Formosa)	1,949	18	1,967	2,663	151	2,814
Turkey	910	-	910	-	-	-
Others	97	1,649	1,746	499	1,716	2,215
Totals	37,782	4,492	42,274	37,366	7,645	45,011
Africa	269	1,320	1,589	3,756	1,931	5,687
Oceania	-	8	8	-	6	6
Unspecified	-	53	53	2	50	52
Totals, All Countries 2/ .	81,017	15,244	96,261	87,026	19,254	106,280

1/ Wholly of U.S. wheat (grain equivalent). 2/ Includes exports for relief or charity.

Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City			No. 1 Northern Spring, Minneapolis		
Date		Price	Date		Price
- cents per bushel -			- cents per bushel -		
November 2, 1959		204 3/4	November 2, 1959		221 5/8
3		204 3/4 - 211 1/4	3		221 1/2
4		201 1/4 - 229 3/4	4		222
5		201 3/4 - 202 1/2	5		222 1/4
6		201 3/4 - 209 1/4	6		222 3/8
9		203 - 207	9		220 1/2
10		201 - 230 <u>1/</u>	10		220 7/8
11		201 - 229 3/4	11		220 1/2
12		200 1/2 - 229	12		220 3/8
13		203 3/4 - 213 1/4	13		220 3/4
16		202 1/2	16		220 1/4
17		201 1/4 - 229 1/4	17		219 1/2
18		202 1/2 - 209	18		219 1/2
19		213 1/2	19		220
20		202 3/4 - 206 3/4	20		219 5/8
23		201 3/4 - 228 1/2 <u>1/</u>	23		217 1/2
24		204 1/2 - 212 1/2	24		217 5/8
25		202 1/4 - 204	25		218
26		THANKSGIVING DAY	26		THANKSGIVING DAY
27		203 - 203 1/2 <u>1/</u>	27		218 1/8
30		203 - 209	30		218 1/8

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
- cents and eighths per bushel -					
November 2, 1959	200/5	204/5	201/1	183/2	185/4
3	200/4	204/3	200/6	182/5	185/2
4	200/1	203/7	200	182	184/4
5	199/7	203/3	199/5	181/4	183/7
6	200	203/6	200	181/5	184/1
9	201	205	201	182/3	184/7
10	202/1	206	201/5	182/4	185
11	201/4	205/3	201/2	182/1	184/5
12	201/6	205/4	201/5	182/5	185/2
13	202/6	206/4	202/4	182/7	185/1
16	202	205/6	201/5	182	184/4
17	201/1	205/1	201/1	182	184/4
18	200/6	205	201/1	182/5	185/2
19	199/4	204/1	200/4	182/2	184/6
20	198/4	203/1	199/5	182/2	184/6
23	198	202/6	199/2	182/2	184/7
24	198/6	203/5	200/1	182/6	185/2
25	199	203/7	200/1	183	185/5
26	T H A N K S G I V I N G D A Y				
27	198/4	203/3	199/3	182/6	185/4
30	198/2	203/3	199/3	183/2	185/6

1/ Nominal.

ARGENTINE SITUATION

Supply Position Total estimated supplies of wheat in the Argentine for the 1958-59 (December-November) crop year, consisting of the December 1, 1958 carryover of 54.1 million bushels and the new crop, officially placed at 246.9 million, amount to 301.0 million bushels, about 10 per cent greater than the 1957-58 total of 272.9 million. After deducting 147.0 million bushels for anticipated domestic requirements, an estimated 154.0 million are available for export and for carryover in 1958-59 compared with 133.3 million in 1957-58.

Exports of wheat and wheat flour in terms of grain equivalent during the period December 1958-October 1959 amounted to 92.9 million bushels, sharply above the total of 67.5 million exported during the same months of 1957-58. The balance remaining on November 1, 1959 for export and for carryover was estimated at 61.1 million bushels compared with the November 1, 1958 total of 65.8 million.

Argentine Wheat Supplies

Item	1957-58	1958-59 <u>1/</u>
	- million bushels -	
Carryover at beginning of crop year (December 1) <u>2/</u> .	59.4	54.1
New Crop <u>3/</u>	213.5	246.9
Total estimated domestic supplies	272.9	301.0
Less estimated domestic requirements for crop year ..	139.6	147.0
Available for export and for carryover	133.3	154.0
Deduct:		
Exports of wheat as grain, December-October	66.6	91.8
Exports of wheat flour in terms of wheat, December-October	0.9	1.1
Total exports of wheat and wheat flour	67.5	92.9
Balance on November 1 for export and for carryover ..	65.8	61.1

1/ Preliminary. 2/ Includes allowances for farm stocks. 3/ Official estimate.

The following account of the Argentine situation has been extracted from a report from Mr. G.E. Blackstock, Assistant Commercial Secretary, Buenos Aires, under date of November 20, 1959 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions from Argentine to Canadian measures have been made for the convenience of our readers. Currency conversions have been made at the rate of 82 pesos per U.S. dollar less 20 per cent retention.

Weather and Crops

The optimistic outlook for the new crops at the time of our last report was confirmed by the official monthly report of the Ministry of Agriculture, which said in part: "The promising outlook for all crops at the end of this month, when the first early wheat harvests are beginning, is evident in the general good condition of all winter crops and linseed after an

abnormally long period of alternating drought and excessive rainfalls which caused the outlook up to the end of September to be uncertain. The notable features of the month of October were widespread rains and generally favourable weather, which promoted good development of the winter growing crops and was also favourable for ploughing in preparation for the summer crops and for seeding. There were widespread rains of varying intensity throughout the grain-growing areas. Temperatures were unstable with many days of bright sunshine, while some light frosts and snowfalls were registered in parts of the provinces of Mendoza, Chubut, Neuquen and Río Negro. In some local areas in the provinces of Buenos Aires, Córdoba and La Pampa there were hail storms, but without noticeable damage. There were some outbreaks of green aphid attacks in the southwest of the Province of Buenos Aires and northeast of the Province of La Pampa, but they were checked by the natural effects of the weather and by rainfalls which aided in the recovery of the crops. There was also some threat of widespread caterpillar (isoca) attacks in Entre Rios and northern Santa Fe, but the combined results of favourable weather and timely action on the part of the Ministry of Agriculture and the producers have counteracted their effects".

Since the end of October however there have been some excessive rains in the north with strong winds and some hail, causing damage to the wheat which has as yet still not been accurately assessed. On the other hand, areas where the new corn is growing seem to be thriving normally, although adverse weather and soil conditions in September improved too late for the expected heavy seedings to be completed. Information is incomplete on oats, barley and rye at present, but no damage has been reported, as these grains are centred mainly in parts of the provinces of Buenos Aires and La Pampa where rainfalls have been adequate but not damaging.

Old Wheat

There has been only one sale during the period under review. On October 26 the Grain Board sold approximately 2,500 metric tons (92,000 bushels) of "Candeal-Taganrog" grain of the 1957-58 crop, at 3,300 pesos (\$1.10 per bushel) for shipment October-November from the up-river port of Villa Constitución. This grain contained an excess of other types of grain and of damaged grain. At present, the Grain Board has called for tenders for the end of November for the sale of up to 20,000 metric tons (735,000 bushels) of out-of-grade 1958-59 wheat, on account of it being smutty and smelly, to be shipped during December from the port of Bahía Blanca. As already reported the National Grain Board has little wheat left available for export, with the exception of some damaged lots, such as the above. Shipments during October at 117,597 metric tons (4,321,000 bushels) decreased from the 129,645 metric tons (4,764,000 bushels) of September. The main customers were Brazil with 74,847 metric tons (2,750,000 bushels), Western Germany with 11,450 (421,000 bushels), Uruguay 8,356 (307,000 bushels) and approximately equal lots of about 4,000 to 5,000 metric tons (147,000 to 184,000 bushels) were shipped to the United Kingdom, the Netherlands, Belgium, Paraguay, Chile and Perú.

Wheat 1959-60

The outlook for the oncoming crop has deteriorated somewhat during the last few days, as a result of widespread damaging wind and rain storms, punctuated in some areas with hail storms. The Province of Santa Fe was the most seriously affected and although it is still too early to ascertain the actual extent of the damage, private trade circles forecast a loss of about 10 per cent in general in the northern growing regions. Regarding the southwestern regions, crops are developing well and the outlook is decidedly favourable, as it is in the provinces of Córdoba and La Pampa. Quoting from an official Ministry of Agriculture bulletin; "Harvesting has begun in the Province of Santa Fe with satisfactory results, the crops showing excellent condition. In the Province of Córdoba the stands show perfect growth and are completely pest-free. Very high yields are expected in this province, one of the best for many years, a forecast confirmed

by yields obtained already from the first harvested lots. There has been an amazing recovery in the wheat areas in the Province of Buenos Aires and the condition of the crops is generally good, with the exception of some areas in the extreme south which were without rains for a long period. In the Province of La Pampa, crops also show good development and many lots are already heading out". This report, published two weeks ago, does not now have to be altered except that in the Province of Santa Fe the crops, as noted above, have suffered some noticeable damage. At present there are some predictions of a wheat harvest of less than 5,000,000 metric tons (183.7 million bushels); some officials of the National Grain Board are speaking of 4,500,000 to 4,700,000 metric tons (165.3 million to 172.7 million bushels). No trouble is expected in the handling and marketing of the crop, as the major part of it will be consumed by the home market, i.e. about 4,000,000 metric tons (147,000,000 bushels) of which 600,000 (22,046,000 bushels) is estimated to be kept for seeding; 3,300,000 (121,253,000 bushels) to be used by local mills; and 100,000 (3,674,000 bushels) to account for losses and with old crops practically sold out, it is possible that the exportable surplus will no more than reach 1,000,000 metric tons (36.7 million bushels) or less. In the meantime a third and final official estimate of the wheat seeded area has been published at 4,740,000 hectares (11.7 million acres), a slight increase over the second estimate of 4,680,000 hectares (11.6 million acres). There are already sellers of new wheat for delivery in December, at 352 pesos (\$1.17 per bushel) in Santa Fe, 356 pesos (\$1.18 per bushel) in Rosario and about 360 (\$1.19 per bushel) in Buenos Aires, and export sales will be favoured by a recent official decree whereby the exemption of the 15 per cent temporary export tax on the 1958-59 and former crops will also be applied to the 1959-60 crop. It is expected that a change will take place regarding the marketing basis for wheat. Up to the present, wheat has been traded on the basis of Semi-hard type, Grade 2, 78 kilos hectolitr weight (62 pounds per bushel). Now exporters are already buying wheat on the basis of Hard type, Grade 1, basis 78 kilos hectolitr weight (62 pounds per bushel). It is not yet clear to what extent this will affect wheat trading operations.

In the meantime the grain trade is slowly adjusting itself to the new conditions of free trading in wheat. Although it seems evident that both exporters and millers will need financing assistance from the Government and is already seeking it, it is also clear that the trade, which stands to benefit by the liberation of wheat trading, will have to work out its new operations with a minimum of dependence on Government assistance and support. Trade in the Buenos Aires futures market has been brisk and some recent prices were as follows, all in pesos per 100 kilos: for delivery in December, 345 (\$1.15 per bushel); January, 350 (\$1.16 per bushel); February, 358 (\$1.19 per bushel); and March, 360 (\$1.19 per bushel).

So far there has been no reaction in the trade circles as regards the wheat trade announcement made by the Governments of Lebanon and Syria that free wheat importation would be allowed in the case of Lebanon and that supplies of up to 200,000 metric tons (7,349,000 bushels) were being sought by Syria. Also, there is no indication yet how much wheat will be bought by Brazil.

Policy Cancellation of the 15 per cent Temporary Export Tax for the New Crop A recent Government decree has been published whereby 1959-60 wheat will also benefit by being exempted from the 15 per cent temporary tax, which had been imposed in January 1959 and then cancelled for the 1958-59 and former crops in March 1959. The ruling is also to be applied to all other grains, as a means of encouraging exports.

Financing of the New Crop Exports and Home Market Purchases The National Government, in coming to the financial assistance of the grain trade which is newly

faced with the problem of financing wheat transactions, has set up a system whereby mills will be granted a credit of up to 80 per cent of the total value of their wheat purchases, up to an overall total amount for all mills of 4,500,000,000 pesos (\$55 million). These credits will be for no more than six months in the case of all provincial mills, and for two months in the case of mills located in Buenos Aires. Co-operatives handling wheat will also be granted up to 80 per cent of the total purchase value to a maximum limit of 300 pesos per 100 kilos (\$1.00 per bushel), the credit only to be good until the end of March 1960. Similar credits are also expected to be available to private exporters.

Grain Sales Sales made by the National Grain Board during the period under review were: Wheat 2,493 metric tons (92,000 bushels) of "Candeal-Taganrog", 1957-58 crop, sold at 3,300 pesos (\$1.10 per bushel) for shipment from Necochea; Yellow: 238 metric tons (8,700 bushels), 1958-59 crop, sold at 3,105 pesos (\$1.03 per bushel) also to be shipped from Necochea. Brewers' barley 1957-58 crop sold at 2,515 pesos (67 cents per bushel) for shipment from Bahía Blanca. Corn yellow or red - 1958-59 crop 232 tons (9,100 bushels) at 2,700 pesos (84 cents per bushel), for shipment from Rosario.

Argentine Wheat Exports December 1958-October 1959 with Comparisons

Destination	Wheat	Destination	Wheat
	- thousand bushels -		- thousand bushels -
Africa, North	974	Madeira	254
Belgium	1,848	Netherlands	4,949
Bolivia	606	Norway	88
Brazil	48,166	Paraguay	2,193
Chile	1,837	Peru	2,399
Denmark	588	Spain	100
France	2,583	Switzerland	11
Germany, Western	10,443	United Kingdom	13,359
Italy	480	Uruguay	307
Lebanon	613	Yugoslavia	37
		Total	91,836
Same Period:			
1957-58			66,576
1956-57			89,541
1955-56			82,849
1954-55			117,831
1953-54			97,917

Grain Shipments Total shipments during October at 442,317 metric tons, decreased slightly from the 459,157 metric tons of last September. Corn exports at 292,877 metric tons (11,530,000 bushels) accounted for more than half of the total, with the following breakdown: Italy, 115,991 metric tons (4,566,000 bushels); the Netherlands, 63,971 (2,518,000 bushels); Belgium, 41,118 (1,619,000 bushels); the United Kingdom, 25,096 (988,000 bushels); Japan, 20,399 (803,000 bushels); Western Germany, 22,320 (879,000 bushels); with smaller lots to Denmark, Sweden and Austria. Wheat exports reached 117,597 metric tons (4,321,000 bushels), Brazil accounting for 74,847 metric tons (2,750,000 bushels), followed by Western Germany

with 11,450 (421,000 bushels); Uruguay, 8,356 (307,000 bushels); Peru, 4,750 (175,000 bushels); Paraguay, 4,901 (180,000 bushels); United Kingdom, 4,206 (155,000 bushels); Chile, 4,004 (147,000 bushels); the Netherlands, 3,483 (128,000 bushels); and Belgium, 1,600 (59,000 bushels). Barley exports were at 13,031 metric tons (599,000 bushels), almost all of which - 12,443 metric tons (571,000 bushels) went to Western Germany while Yugoslavia received 562 (26,000 bushels), and Italy, 26 (1,200 bushels). Oats exports at 3,477 (225,000 bushels) were divided between Italy, 2,840 tons (184,000 bushels) and Yugoslavia, 637 (41,000 bushels). Only 700 tons (27,600 bushels) were exported of Rye, 500 (19,700 bushels) for the Netherlands and 200 (7,900 bushels) for Belgium.

AUSTRALIAN SITUATION

Supply Position Estimated supplies of wheat in Australia for the 1958-59 (December-November) crop year amount to 230.5 million bushels, consisting of the December 1, 1959 carryover of 16.5 million and the 1958-59 production estimated at 214.0 million. Supplies of the size indicated represent an increase of 64 per cent over the 1957-58 total (including imports of 1.5 million bushels) of 140.6 million bushels. After deducting 70.0 million bushels for anticipated domestic requirements, an estimated 160.5 million are available for export and for carryover during 1958-59, in contrast to 67.8 million in 1957-58.

Combined exports of wheat as grain and wheat flour in terms of grain equivalent up to October 31 of the 1958-59 Australian crop year amounted to 82.1 million bushels, well above the 46.5 million exported during the corresponding period of 1957-58. The balance remaining on November 1, 1959 for export and for carryover, at 78.4 million bushels, exceeded by a wide margin the comparable 1958 total of 21.3 million.

Australian Wheat Supplies

Item	1957-58	1958-59 <u>1/</u>
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1)	41.5	16.5
New Crop	97.6	214.0
Total estimated domestic supplies	139.1	230.5
Imports December-October	1.5	-
Total estimated supplies	140.6	230.5
Less estimated domestic requirements for crop year .	72.8	70.0 <u>2/</u>
Available for export and for carryover	67.8	160.5
Deduct:		
Exports of wheat as grain, December 1-October 31 .	30.9	61.1
Exports of wheat flour in terms of wheat, December 1 - October 31	15.6	21.0
Total exports of wheat and wheat flour	46.5	82.1
Balance on November 1 for export and for carryover .	21.3	78.4
<u>1/</u> Preliminary. <u>2/</u> Revised.		

The following information relative to the Australian situation has been extracted from a report from Mr. T.G. Major, Commercial Counsellor for Canada, Melbourne, under date of November 18, 1959 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Currency conversions have been made at the rate of £1 equals \$2.1234 (Canadian) the quotation in effect on November 9, 1959.

Seasonal Conditions and Prospects

Harvesting of the 1959-60 wheat crop is underway in the early districts of Queensland and New South Wales. Heavy rains of five to nine inches on the Darling Downs have soaked the soil preventing the use of heavy machinery and so delayed the harvesting of ripe grain. Second growth of wheat and weeds will make harvesting difficult and there has been considerable hail damage in some areas. Harvesting of the New South Wales crop in the northern part of the State began under favourable conditions in late October. In general the seasonal conditions have been satisfactory except in the Riverina where dry weather delayed seeding. Although August was a dry month the rains in October and early November benefitted the later sown crops and a production close to that of last year is anticipated. In the other States lower production levels than in 1958-59 are anticipated as a result of inadequate rainfall throughout the winter months. Estimates of expected total production show variations ranging from 145 to 165 million bushels. However, it is probable that a figure somewhere in the vicinity of 160 million bushels will not be far off the mark. If the State Government estimate of 67 million bushels for New South Wales is borne out a somewhat higher production may eventuate, although this may be counterbalanced by lower returns in Western Australia and Victoria. The State estimates made by the Wheat Pool of Western Australia early in November are as follows:

1959-60

Queensland	15 million bushels
New South Wales	62 million bushels
Victoria	28 million bushels
South Australia	7 million bushels
Western Australia	48 million bushels

Wheat Marketing and Supplies

After several months of slow export sales there was sudden activity during the last week of October and the first week of November, producing the heaviest sales during any such period during the past two years. In all, some nine million bushels were sold, of which the United Kingdom and Ireland took three millions, India and Japan two each, Iran one and East Africa and New Zealand half a million each. Earlier, Germany bought a million bushels, reflecting the result of the new trade agreement. Since the middle of October the following sales have been reported:

	long tons	bushels		long tons	bushels
United Kingdom ..	120,618	4,503,000	Eire	9,000	336,000
Rhodesia	19,600	732,000	Kenya	300	11,000
Lebanon	5,000	187,000	Iraq	30,000	1,120,000
Iran	1,000	37,000	Pakistan	37,500	1,400,000
India	55,000	2,053,000	Okinawa	2,700	101,000
Japan	83,690	3,124,000	Philippines ..	500	19,000
New Zealand	20,000	747,000	Mozambique ...	5,500	205,000

Miscellaneous Wheat Items

The Minister for Primary Industry, Mr. C.F. Adernan, has announced the appointment of members of the Australian Wheat Board for the

three-year term commencing October 26, 1959 with Sir John Teasdale occupying the position of chairman again A forecast of eleven shillings (\$1.17) per bushel for bulk and eleven shillings four pence (\$1.20) per bushel for bagged wheat for the first payment on the current crop has been made by a New South Wales member of the Board The very short crop in South Australia has raised fears of a shortage of seed for the 1960-61 crop and the Australian Wheat Board has decided to make supplies of f.a.q. wheat available to meet the emergency. Normally the Board does not sell wheat for seed and will not assume any responsibility for suitability. Special arrangements are being made by the State government to publicize sources of supply of seed so as to ensure the greatest possible utilization of suitable varieties The Commonwealth Scientific and Industrial Research Organization has announced the formation of a wheat research unit, financed from funds levied under the Wheat Research Act, which will investigate factors affecting the quality of Australian wheat The West German Government has agreed to reduce subsidized flour exports to traditional Australian markets. Such exports had reached the stage where they were threatening Australian export prospects As a result of a continuing high proportion of unmillable wheat for several years past in the New South Wales crop, the Australian Wheat Board has decided to reject deliveries containing more than 5 per cent of unmillable quality Construction of a bulk grain terminal at Geraldton, Western Australia has begun. Expected to be completed in time for the 1959-60 crop, the terminal will have a capacity of two million bushels and will cost about £1,300,000 (\$2,760,000).

Exports of Australian Wheat and Wheat Flour in Terms of Wheat December 1 -
October 31, 1958-59 and Corresponding Period 1957-58

Destination	Wheat		Wheat Flour	
	1957-58	1958-59	1957-58	1958-59
	- thousand bushels -			
Aden	113	521	-	-
Aden and Aden I/T	-	-	894	1,132
Aden and Aden (Atta Flour)	-	-	164	303
Africa, South	-	1,486	-	-
Austria	-	479	-	-
Belgian Congo	-	-	3	1
British North Borneo	-	-	201	183
British West Indies	-	-	1	1/
Brunei	-	-	27	32
Burma	108	259	481	349
Ceylon	10	7	714	4,613
China	388	-	-	-
Cocos Islands	-	-	1	1/
Cyprus	-	-	-	4
Dutch New Guinea	-	-	77	76
Egypt	-	-	2	-
Eire	818	4,143	-	-
Germany, West	-	3,096	-	-
Ghana	-	-	2	12
Hong Kong	1,763	2,256	-	-
Hong Kong (General)	-	-	166	208
Hong Kong (a/c War Office)	-	-	4	-
India	562	1,719	-	-
Indonesia	-	-	1,393	2,006
Iran	8	304	-	-

Exports of Australian Wheat and Wheat Flour in Terms of Wheat December 1 -
October 31, 1958-59 and Corresponding Period 1957-58

Destination	Wheat		Wheat Flour	
	1957-58	1958-59	1957-58	1958-59
	- thousand bushels -			
Iraq	262	5,551	-	-
Japan	5,462	13,140	-	-
Kenya	-	785	2	-
Laos	-	-	-	3
Lebanon	-	444	-	-
Macao	-	-	8	10
Malaya	-	540	4,502 ^{2/}	2,581
Malaya (Atta Flour)	-	-	67 ^{2/}	43
Maldiv Islands	-	-	67	44
Malta	410	383	-	-
Mauritius	-	1	803	681
Mozambique	-	-	-	^{1/}
New Zealand	9,066	7,173	5	^{1/}
Nigeria	-	-	2	1
Nyasaland	-	-	183	161
Okinawa	-	22	-	-
Pacific Islands	20	25	1,824	1,870
Pakistan	-	1,220	-	-
Pakistan (Atta Flour)	-	-	1	-
Persian Gulf	72	115	133	151
Persian Gulf (Atta Flour)	-	-	497	860
Philippine Islands	-	609	370	112
Port Said (a/c S/S)	-	-	10	8
Portuguese East Africa	-	83	-	-
Portuguese India (Goa)	31	118	30	85
Rhodesia	2,347	2,321	-	-
Sarawak	-	-	183	183
Saudi Arabia	267	98	84	46
Seychelles Islands	-	-	28	32
Singapore	633	132	-	2,397
Singapore (a/c War Office)	-	-	89	48
Singapore (Atta Flour)	-	-	-	35
Somaliland, British	-	-	9	6
Somaliland, French	-	-	33	-
Thailand	5	5	684	571
Timor	-	-	25	19
United Kingdom	8,530	17,248	1,466	1,878
Zanzibar	14	11	264	157
Royal Navy	22	30	14	8
Ships' Stores	-	-	88	89
Totals	30,911	64,324	15,600	21,000

^{1/} Less than 500 bushels.

^{2/} Malaya and Singapore.

FRENCH SITUATION

The following account of the current crop situation in France has been extracted from a report by Miss V.F. Wightman, Agricultural Attaché, Canadian Embassy, Paris, under date of November 19, 1959, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions from French to Canadian measures have been made and rounded for the convenience of our readers. Currency conversions have been made at the rate of one franc equals .002 Canadian dollars.

Weather and Crops From mid-October, rain began to fall in the northern two-thirds of France, thus breaking the drought of the previous three to five months, according to region. By rendering the soil workable once more, the rainfall facilitated the later sugarbeet harvest and permitted fall plowing which was seriously delayed.

Fall seeding began in the second half of October, but due to the late start and to the relative dryness of the soil, the area seeded remains considerably below other years at the same time. Seeding of wheat will probably continue up to the end of the year, whereas the period for coarse grains is shorter, and the bulk will now await the spring. Other fall-sown crops, such as rapeseed, are substantially reduced.

The French Ministry of Agriculture has now issued the November crop estimates, which are the last for the 1959 growing season until final figures are released next year. There is normally very little difference between the November estimate and the final.

The November 1 estimate of 1959 acreage, yield and production of selected grains compared with previous years is as follows:

Grain	Average 1954-1958	Year 1958	November 1, 1959
<u>Area Seeded</u> - thousand acres -			
Wheat	10,360	11,399	10,932
Rye	926	856	812
Barley	4,076	4,402	4,904
Oats	4,743	3,673	3,720
Mixed Grain	264	260	222
<u>Yield per Acre</u> - bushels -			
Wheat	33.5	30.9	38.8
Rye	19.4	19.8	22.2
Barley	42.2	40.5	46.1
Oats	46.5	46.5	49.4
Mixed Grains <u>1/</u>	28.2	28.7	30.0
<u>Production</u> - thousand bushels -			
Wheat	347,562	352,779	424,418
Rye	18,005	16,918	18,040
Barley	172,020	178,759	226,061
Oats	220,906	171,015	183,169
Mixed Grains <u>1/</u>	7,464	7,500	6,705

1/ In bushels of 50 pounds.

French Wheat Pricing A decree of October 30 has confirmed the producer prices for deliveries over 50 quintals (184 bushels), indicated in last month's "Wheat Review". These prices cover levies on growers to help offset export losses. On estimated total deliveries of 8.4 million tons (308,644,000 bushels), the breakdown is as follows, as developed from a basic price of 3,800 francs per quintal (\$2.07 per bushel).

<u>Deliveries</u>	<u>Net Price</u>	<u>Delivery Breakdown</u>
	After taxes - levies ^{1/} dollars per bushel	thousand bushels
Up to 184 bushels	2.01	112,986
185 to 735 bushels	1.84	95,165
736 to 2,205 bushels	1.74	56,952
Over 2,205 bushels	1.65	43,541

^{1/} Taxes totalling 4 cents per bushel.

Levies on progressive scale, basic coefficient of 9.4 per cent multiplied by 2, 3 and 4, to give 18.8 per cent, 28.2 per cent and 37.6 per cent for larger deliveries.

Flour Extraction Rate Lowered Beginning with mid-November, the extraction rate for flour will be lowered to increase availabilities of bran. The rate is reduced from the official standard weight, 75 kg. per hectolitre (60 pounds per bushel) of wheat, minus 1 to minus 3, i.e. from 74 to 72 (59 to 58 pounds per bushel). This measure should yield an additional 81,000 tons (1,786,000 hundredweight) of bran and by-products per month, at a time when winter feed reserves are low as a result of drought during the summer.

Subsidy on Durum Seed As was the case last year, in order to encourage production, the French government is offering a subsidy on durum seed of 3800 francs per quintal (\$2.07 per bushel) - plus 1500 francs (82 cents per bushel) for particularly high quality. The official price for 1959 crop durum is 4800 francs per quintal (\$2.61 per bushel).

Exports 1958-59 Crop Year Following are French exports of wheat and flour for the 1958-59 crop year - ended July 31 compared with the previous crop year. It will be noted that with lower export availabilities, France concentrated on its flour markets, and in wheat, almost entirely on Germany, with whom there is a long term contract.

Exports to Foreign Countries August 1 to July 31

Destination	<u>Wheat</u>		<u>Flour (wheat equivalent)</u>	
	1957-58	1958-59	1957-58	1958-59
- thousand bushels -				
Aden and Djeddah	-	-	34	17
Andorra	-	-	50	51
Angola	-	-	755	393
Belgium and Belgian Congo	9	-	200	123
Burma	-	-	1	6
Canaries	1,521	-	5	6
Central America	-	-	-	636
Ceylon	-	-	3,862	-

Exports to Foreign Countries August 1 to July 31

Destination	Wheat		Flour (wheat equivalent)	
	1957-58	1958-59	1957-58	1958-59
- thousand bushels -				
China	38	-	-	-
Czechoslovakia	425	-	-	-
Denmark	702	568	-	-
Egypt	-	-	5,761	-
Ethiopia and Eritrea ...	-	-	45	63
Finland	22	-	-	-
French West Africa	-	-	-	2
Germany	19,959	10,207	-	1,055
Goa	-	-	3	114
Great Britain	27,683	1,351	402	769
Hungary	-	-	-	-
Indochina	-	-	-	9
Indonesia	-	-	2,957	256
Ireland	-	22	-	-
Jamaica	-	-	11	-
Jordan	-	-	59	18
Koweit	-	-	11	-
Lebanon	-	-	531	212
Libya	-	-	237	68
Malaya	-	-	994	363
Malta	126	-	-	-
Mauritius Island	-	-	42	16
Morocco	-	-	1,191	-
Mozambic	-	-	1	-
New Caledonia	-	-	64	-
New Hebrides	-	-	2	-
Netherlands	3,281	543	73	137
Norway	1,236	-	-	-
Pacific Islands	-	-	-	570
Pakistan	2,011	-	-	-
Portugal	-	491	-	1,973
Sao Tomé	-	-	1	-
Seychelles Islands	-	-	-	1
Spain	-	110	-	-
St. Pierre and Miquelon.	-	-	-	2
South America	-	-	-	44
Sudan and Djibouti	-	-	568	45
Sweden	645	-	-	-
Switzerland	1,139	496	132	-
Tahiti	-	-	-	-
Tangiers	-	-	-	520
U.N.R.W.A.	-	-	204	55
Foreign Ships' Stores ..	-	-	94	195
Totals	58,797	13,789	18,291	7,719

Cont'd. from page 5

caused considerable damage, and possibly Bulgaria. Output in the Soviet Union is expected to be somewhat smaller than in 1958, because of smaller acreage and insufficient moisture in several districts. However, there is no doubt that Russian supplies will exceed domestic needs and, if the demand from the European satellites turns out to be less burdensome than in 1958, the possibility of stronger Soviet competition in western markets will be enhanced.

In Asia The supply of foodgrains in Asia is, by and large, better at the present time than it has been for a good many years. In spite of this improvement and the current high level of imports, it can be assumed that the potential demand for food still remains very large. Wheat production was considerably above average in India, Pakistan and Iran, but Turkey's crop has been somewhat smaller because of drought. Reports on the crop in Communist China are limited and often contradictory and, although it seems that production of wheat and other grains is increasing, it is difficult to say whether any improvement has been made on a per capita basis. Japan reports a good rice crop and a slightly below average production of other foodgrains. In examining prospects for wheat exports to Asian countries, the local availability of rice is of foremost importance. Reliable estimates indicate that rice production has been satisfactory in nearly every Asian country. It must be noted, however, that consumer acceptance of wheat is growing among Asians, especially in Japan.

On the basis of domestic availability of milling-quality wheat and other foodgrains in importing countries, it seems reasonable to expect some decline in import demand. It must be noted that the smaller wheat production of this year is largely centered in exporting countries; it is therefore of little consequence for international trade. In view of the present level of stocks and of the limited elasticity of wheat demand, the favourable balance-of-payments position of many leading importing countries, the low cargo rates, and attractive grain prices are not likely to stimulate the wheat trade noticeably. It seems, therefore, that total world trade in wheat will shrink moderately compared with the level of last year.

In the face of a re-entry of Australia and France into the export market with normal exportable supplies, a decline in demand is bound to stiffen competition among exporters. This will be felt particularly among the suppliers of filler-type wheats, because they will have to compete directly with the unusually high quality crops in Western Europe. It may not unduly affect the take of the strong wheats such as Canada provides.

CALENDAR OF WHEAT EVENTS

- November 9 According to Foreign Crops and Markets, published by the Foreign Agricultural Service, U.S.D.A., a Japanese government program to raise the quality and quantity of wheat and barley production will be inaugurated in the 1960 season and will continue until 1970. Success of the program would mean that Japan would need to import only hard wheat, which it is unable to produce.
- 12 According to a press report the world wheat championship awarded at the Royal Agricultural Winter Fair at Toronto was won by Mr. Douglas J. Mackintosh of Granum, Alberta with a sample of Chinook variety.

According to a press release published by the Board of Grain Commissioners, Western Canada's 1959 hard red spring wheat crop is high in protein content and baking strength, but bushel weight is lower than in 1958. Average protein content is 14.2 per cent, 0.4

per cent higher than in 1958 and 0.7 per cent higher than the long-term average.

November 18

On the basis of yields indicated at October 31, Canada's 1959 wheat crop was estimated at 413.5 million bushels, 11 per cent above last year's estimate of 371.7 million but 16 per cent below the 1949-1958 average of 490.4 million. A survey conducted concurrent with the yield survey indicated that some 112 million bushels of wheat in the Prairie Provinces remained to be threshed after November 1.

According to a report received from Mr. T.G. Major, Commercial Counsellor for Canada, Melbourne, Australia, private estimates of expected total wheat production in Australia range from 145 to 165 million bushels and it is probable that the figure will be somewhere in the vicinity of 160 million bushels.

- 19 According to a report received from Miss Vivian Wightman, Agricultural Attaché, Canadian Embassy, Paris, the French Ministry of Agriculture has issued the November crop estimates, which are the last for the 1959 growing season. Production of wheat is placed at a record 424.4 million bushels.

The extraction rate for flour in France has been lowered as at mid-November to increase the availabilities of bran, at a time when winter feed reserves are low as a result of drought during the summer.

- 20 According to a report received from Mr. G.E. Blackstock, Assistant Commercial Secretary, Buenos Aires, a third and final official estimate of the area seeded to wheat in Argentina has been published at 11.7 million acres, a slight increase over the second estimate of 11.6 million. Some officials of the National Grain Board are placing production at 165 million to 173 million bushels.

Two new varieties of hard red spring wheat have been developed by the Canada Department of Agriculture and are ready for release to growers in the Prairie Provinces. The varieties "Pembina" and "Canthatch" were developed by the Rust Area Project Group centered at the Department's Winnipeg research station.

December 1

According to Broomhall seeding has been active during the past week over much of the continent of Europe with farmers rushing to accomplish as much as possible before winter weather sets in. This work has been expedited recently by mild weather and much improved moisture conditions. However, reports from some countries state that more rain will be needed before frosts are experienced and continued mildness also would help in attaining full acreages in a number of countries.

Further rains have been received in the United Kingdom over the past week which have caused more delays in planting of winter grains. As a result, hopes have been fading that planned acreages can be realized this fall unless dry, open weather prevails during this month. Earlier planted fields, in most instances, have a fairly good appearance.

CANADIAN WHEAT* AND WHEAT FLOUR**EXPORTS (SPECIFIED PERIODS)

MILLION BUSHELLS

400 —

350 —

300 —

250 —

200 —

150 —

100 —

50 —

0

MILLION BUSHELLS

400 —

350 —

300 —

250 —

200 —

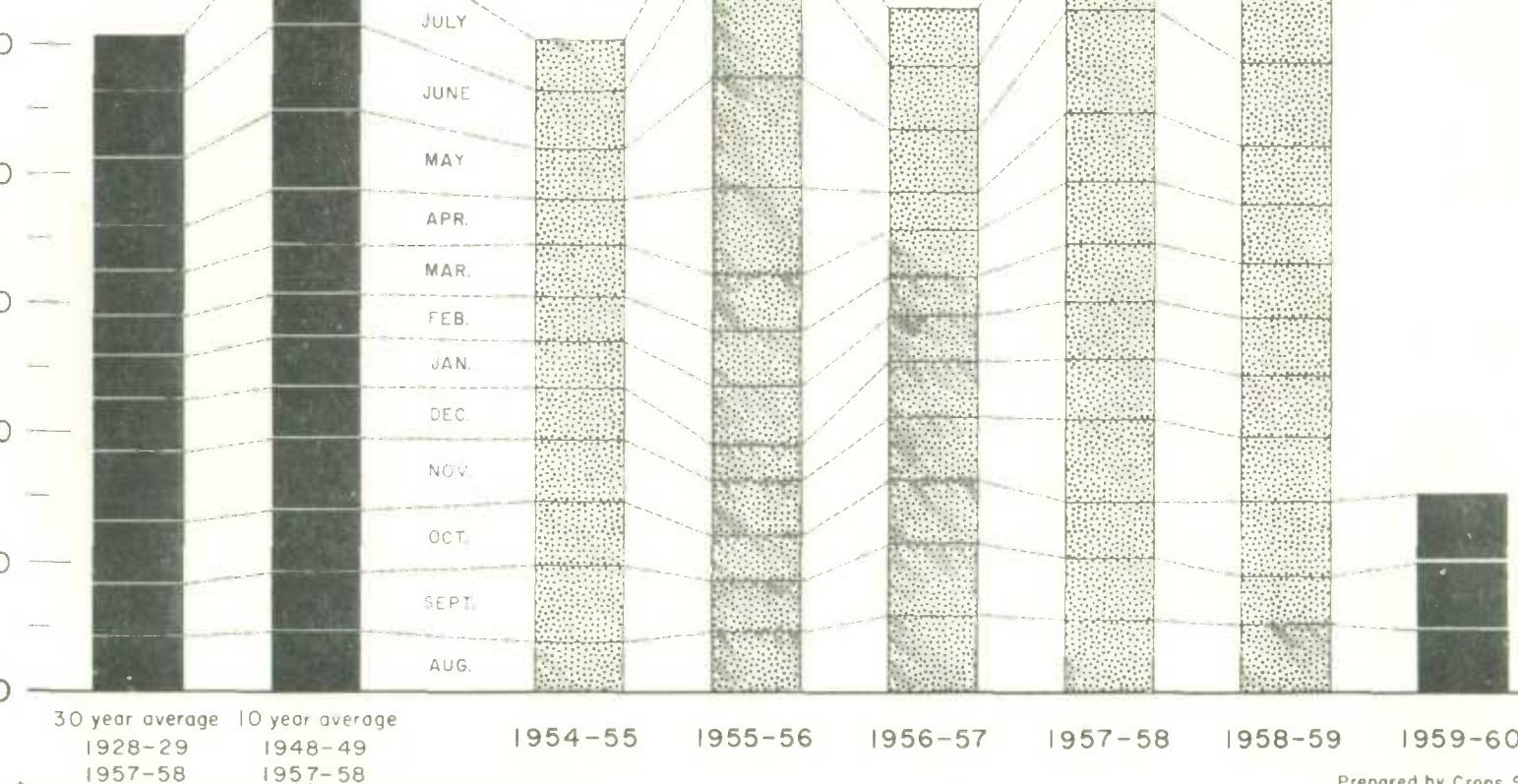
150 —

100 —

50 —

0

PEAK EXPORTS
1928-29 CROP YEAR
4076 MILLION BUSHELLS



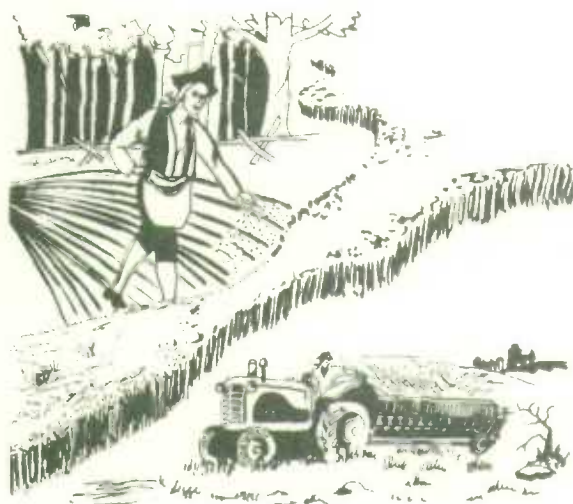
*Includes bagged seed wheat. **In terms of grain equivalent.

Prepared by Crops Section
and Drafting Unit D.B.S.



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Canadian Agriculture



YESTERDAY The Census of New France in 1667 recorded a population of 3,918 whites (668 families), having 11,448 arpents under cultivation with 3,107 cattle and 85 sheep.

TODAY The 1956 Census recorded a population of 16,080,791 and 3,711,500 families with 2,746,755 persons living on 575,015 farms having an area of 173,923,691 acres, and livestock population of 11,019,403 cattle, 784,018 horses, 4,732,799 pigs, 1,638,194 sheep and 73,160,368 poultry.

Statistics on farming were essential to determine the progress of the young colony. Today agriculture is a far-reaching and complex industry and there is constant need for statistical data on its many phases.

DBS conducts 5- and 10-year censuses of agriculture which provide a detailed picture of the development of the industry.

DBS publishes a wide range of current information on production, value and disposition of field and special crops, livestock, dairying, fur farms; and on farm cash and net income, farm wages and prices of agricultural products.

DBS data on agriculture are essential to planning in the industry and in many other fields and are used extensively by governments, farmers and farm organizations, food packers and processors, storage warehouses, wholesalers and retailers, transportation services, consumers, exporters and importers, manufacturers of farm implements and fertilizers, banks and other lending agencies.

A full list of DBS publications on Agriculture and other aspects of the Canadian economy is contained in the Catalogue of Current Publications 1959. Write for a free copy to: Information Services Division, Dominion Bureau of Statistics, Ottawa.